**Working with Volunteers**

**Session Notes**

**(Heelis 10th January 2012)**

**Learning objectives**

By the end of the updated Working with Volunteers course participants should be able to have:

* Knowledge of the range of ways volunteers are engaged with the Trust
* Knowledge of the benefits and reasons for volunteer involvement and added value which volunteering brings to the organisation
* An awareness of the different stages of the volunteer lifecycle and an overview of the associated procedures
* Knowledge of the Essential Standards of Volunteering and Practice Checklist
* Knowledge of where to go for specialist information and guidance within the organisation
* An understanding of what knowledge, skills and behaviours are required to manage volunteers effectively
* An understanding of the legal differences between a volunteer and a paid member of staff (impacts of Employment Law)

### The course is approximately 345 minutes in length including breaks. This means the timings for the day could be 10.15am – 4pm.

The course is designed to be delivered by one or two people.

The content can be adapted to meet the needs of the group of participants.

The course is aimed at volunteer managers, voluntary volunteer managers and those working with volunteers who are new to the Trust. It can also be delivered as a refresher to Property staff, including Property Managers.

### **Overview**

This course is designed to provide a brief introduction to managing volunteers including some of the wider political and philosophical issues, to enthuse people and encourage them to feel committed to working with volunteers and to start them thinking about how well their property is currently managing volunteers, how they can assess this and what makes a good manager. The course also highlights support in place to assist managers in their work and gives participants the opportunity to discuss volunteer management scenarios with others in a supported setting.

Your choice of activities depends on the composition of the group and how direct their contact is with volunteers. Some groups will need a more wide ranging, policy level approach, others will benefit from more specific discussion on the practicalities of managing volunteers.

**Pre –course instructions;** Each participant should be sent pre-course instructions a few weeks before the course. See template.

**Participant packs**; Packs should be made up for all participants. Participants should also have the opportunity of having the documents on a CD.

**Content of participant packs (in this order)**

A copy of the powerpoint slides (two slides per page)

A copy of the scenarios and key learning points

Appendix A – Other training / learning opportunities

Appendix B - Other Useful Resources (copies of these resources can be found in the Working with Volunteers section of the Volunteering pages on the Intranet).

**Including;**

Volunteer enquiry and registration form

Volunteer Enquiry to Induction checklist

Volunteer Interview Evaluation form

Volunteer rejection letter

Volunteer Induction checklist

Volunteer Review Form

Awards and recognition

Guideline on legal status

Whole Trust VCI team

Consultancy regional teams

**Evaluation forms and Certificates;** Ask all participants to complete evaluation forms at the end of the course. These should be collated and the process for doing this should be agreed at regional level. Certificates should also be given to all participants. See attached documents.

**Follow up;** It is a good idea to establish with participants how you or someone else will follow up with them after the end of the course. This may be via email contact, telephone conversation or visit to their property.

**Developing additional training material;** If you develop any supplementary exercises it would be useful to share this with other people delivering the course. Please contact Linsey Winter with any additional material and she will cascade this to other trainers.

**Working with Volunteers – delivery notes**

**Before session**

* + **set up car park**
  + **cut up EVS bits**
  + **print of scenarios**
  + **vol management circle**

**Equipment**

* + **power point**
  + **flip chart**
  + **pens**
  + **post it notes**

| **Time** | **Section** | **Notes** | **PP Slide** |
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| 10.15 – 10.20  Mike | **Welcome and introduction (5 minutes)** | **slide 1**   * Welcome the group * Introduce self * This is a participative session – for you to share your knowledge and experience with us and, each other – ask questions * Safe space to explore ideas and working – confidentiality agreement * Housekeeping:   + Fire procedures   + Facilities   + Clarify start and finish times   + Breaks and lunch times 11.30ish, 1pm during exercise   + Mobiles off |  |
| 10.20 – 10.40  Michelle | **Introductions and aims for the day**  **(20 minutes)** | **slide 2**  **Write up key things people want from the day.** |  |
| 10.40 – 10.45  Mike | **Agenda setting (5 minutes)** | **Slide 3 & 4**  Link to previous section where people have said what they would like to get out of the course.  This course is aimed at people   * working with * leading * managing volunteers   so there is a good mix of people on the course.  Morning - focus on why people volunteer and what that means at NT  Afternoon – explore different volunteering situations and legal theory  Some will have more experience with the Trust or more experience of working with volunteers and so this will be a good opportunity to share learning and support each other.  This course provides an introduction to volunteering and volunteer management.  Introduce the ‘car park’ idea for any volunteering related queries comments people may have. The car park is a piece of flip chart paper and participants can put write up any issues, thoughts, questions ideas on it that they think of during the day that are not directly related to the course content.  Ground Rules  The trainer should then insure that any answers to questions are fed back after the course.  Copies of slides can be found in the participant packs and other documents linked to the content today. |  |
| 10.45 – 11.05  Michelle  Mike | **What do volunteers do? (20 minutes)** | **Slide 5**  **Task**  **In groups, participants have five minutes to think of the different ways volunteers are involved in the Trust.**  **Feedback**  **Slide 6**  Around 12,000 Room Guides.  Hundreds of different volunteer roles. Garden volunteers; Tour guides; Admin: Talk Service; Catering; Retail; Education; Visitor services; Conservation; VVMs – countryside and built properties.  **Employee Volunteering**  7,500 employee volunteers and counting, 45,000 hours contributed by volunteers, 1.5 million people volunteer through employer supported schemes (7% of people in employment) Business in the Community (BITC) 2004.  Example; Cadbury’s spent a day at Osterley Park building Wattle Fencing, as part of a team building exercise. (See photo on slide)  **Working Holidays**  **The National Trust involve around 4000 volunteers in Working Holidays every year throughout England, Wales and Northern Ireland. All these holidays are run by volunteer leaders, who are specifically selected and trained for these roles.**  Example; A group of 16 people spent a week at High Wray Base Camp in the Lake District doing Dry Stone walling. This was part of a digital photography themed week.  **Full time volunteering**  The National Trust offers a number of opportunities for full-time voluntary work. Full time volunteers usually give 21 hours or more a week, are available for at least three months and are over 18 years old. Craflwyn have a full time volunteer who assists with taking groups of volunteers out on tasks.  **Volunteer Groups**  40 groups. Many volunteers work together as part of a local National Trust Volunteer Group undertaking a variety of tasks at properties local to them and sometimes further a field. The Groups take part in conservation days and weekend events as well as social activities.  **Example;** In November 2008 Norfolk NTV Group launched the Horsey Breathing Place in the Norfolk Broads.  They secured £8000 funding from the Big Lottery Fund and worked tirelessly on the development of a wildflower meadow, accessible wildlife garden and orchard.  **Youth programmes** – partnerships with the Princes Trust, Young Heritage Leaders, DofE, John Muir Trust and the youth led YOMAC (You, Me and the Climate). For example, at Cotehele, young people have undertaken a Gardening and Landscape course at the property for 2-3 weeks and then many have gone on to become full time volunteers.  **Internships / Family Volunteering** |  |
| 11.05 – 11.25  Michelle  Mike | **Why do people volunteer?**  **(20 minutes)** | **Slide 7**  **Split the group into two groups. One group list the reasons, “Why people volunteer with the Trust”, and the other group lists “Why the Trust involve volunteers”.**  **(5 mins)**  **Feedback (5 mins)**  Take two answers from each group until all answers are fed back.  **Slide 8**  **Important to feed in;**  Stress the importance that the volunteering market is very competitive. We need to think more carefully what we can offer volunteers and all volunteering needs to be **mutually beneficial.**  **Slide 9**  We are one of the largest volunteer involving organisations. Other big ones include BTCV (300,000 volunteers), British Red Cross (32,000) and WRVS (55,000), Samaritans 30,000 volunteers and 150 staff.  **61,000 volunteers and around 4,300 employees. This equates to a ratio of 1 employee to 100 volunteers at property level.**  Different ways volunteers are involved with us – pick out some unusual examples from your region. Volunteers are getting involved in all areas of our work and at all levels. Volunteers seen as the key to deliver improved visitor engagement and local community engagement. Volunteers are our first and best bridge into the local community  People volunteer for a whole variety of reasons.  We need to be receptive to this and ensure the way we manage volunteers supports this. For example, when we are promoting role, the level of support we offer, the training we provide etc.  There will be increased competition for people’s time and an expectation of greater choice in the future.   * Later retirement ages * Fuel costs * Childcare needs * Skills development * Career changers   **Background information**  **Motivations**  Attracting and keeping the number and quality of volunteers necessary is a challenge and one that is likely to get harder in the future. A recent government survey on volunteering, *Helping Out - A national survey of volunteering and charitable giving*, noted that learning new skills, career progression and getting a recognised qualification was a prime motivation for 28 % of volunteers. For people between 16 and 24, this increases to 75%. Other common reasons included improving things and helping people (53%), the importance of the cause to the volunteer (41%) and because they had spare time on their hands (41%).  **Benefits to NT**  Important to stress that volunteers have a dual role – they are supporters and are central to engaging others. : friends, family and their local communities.  **Important to feed in;**  Volunteers are our best bridge to the local community. They are (or should be!) reflective of that local community, are members of it, and have a wide range of links into that community. E.g. a volunteer recruiter on Burton Bradstock beach and car park is well known by local people, and is the property's closest link into that local community.  Volunteers are active people with a wide range of connections and interests. We need to recognise, value and respect those links.   * Our local volunteers (and staff) can tell us a lot about the (long term) history and issues of our local community - and our reputation with them too. * They can help us gain access to new audiences, shift local perceptions, generate interest in volunteering, strengthen local connections and manage our reputational risks. * Volunteers might be (or know well) long standing members of active local interest groups, or even local government - such as the WI or parish councils. * Our local volunteers will talk to friends and family about their volunteering experience, greatly influencing local perceptions of us - what would you like them to be saying about your property? |  |
| 11.25 – 11.40  Mike | Volunteering and NT core purpose and strategy | **Slide 10**  Show slide with quote from Octavia on it.  Stress that volunteers have always been central to the Trust’s work. In 1937, there were just twelve paid staff to support the work of hundreds of volunteers serving as members of local management and national committees; by 1957, staff numbers had only crept up to 110.  **Slide 11**  Show strategy wheel and stress that volunteering is central to achieving organisational objectives.  **Volunteering in the future.**  **Hand out post its and in pairs they have 3 minutes to think of new volunteer roles. Stick up post its on board and talk through some of them**.  Are there any areas of the Trust work we shouldn’t involve volunteers?  **Slide 12**  Refer to ‘Future of Volunteering slide’ and expand on things that haven’t already come up.  **Spontaneous / taster activities**    **Volunteers as ambassadors, community champions** - Helps with reaching new audiences, shift perceptions, generate interest in volunteering, change culture , strengthen local connections and manage reputational risk, etc.  **Utilising existing skills** – often described as high impact volunteering – latest survey demonstrated that volunteers do not feel their existing skills are being utilised. Great opportunity to tap into fundraising, project management, marketing, training, IT skills – to view volunteers as ‘consultants’.  **Voluntary Volunteer Management / Leadership** – introduction of roles to help build capacity and enrich volunteering experience. For example, Ham House have introduced a team of volunteers to manage the wider volunteer base. A Volunteering Programme Manager managing a Volunteer Recruiter, Induction and Development Volunteer and Volunteer Administrator.  **Virtual volunteering** – opportunity for people to get involved in their own time, away from the property – more flexible and empowering. Potential for volunteer to volunteer / visitor connections – where volunteers provide trip advice to others, update information, support research, moderate forums. This type of role will reach out to a new group of volunteers e.g. those with a disability.For example, many young people want to become involved in campaigning and want to do this in the comfort of their own home.  **Skill development** – more volunteers are looking at ways to enhance their skills and learn new things. Internships and offering volunteers the chance to do formal qualifications such as NVQs  The above is in line with current trends in the external volunteering environment and will reach out to a wider market of volunteers. Feed in examples such as London Voices, Whose Story project and family volunteering in general.  Huge potential for volunteering in line with the strategy. Volunteers are central to achieving our objectives.  So much potential for volunteering in the Trust. The important thing to highlight is that volunteer management is the key to achieving this potential. We need to get the management right. |  |
| 11.40 – 11.55 |  | **BREAK** |  |
| 11.55 – 12.05  Michelle | **Overview of the 2010 volunteer survey (10 minutes** | **Slide 13**  **Ask participants to shout out the missing percentages**.  Is there anything that particularly stands out to people?  What are the implications of these statistics?  I would recommend the National Trust as a place to volunteer  59%  I enjoy the volunteering I do  73%  I am satisfied with the way my volunteering is organised and managed  45%  Stress again that good volunteer management is key and that the participants have a key role to play in enhancing things.  Stress the KPI Volunteer Recommendation strongly agreed.  Target by 2011/2012 – 65%. |  |
| 12.05 – 12.35  Mike | **Volunteer Journey**  **30 mins** | What does it take to create a good volunteer experience?  What are the steps we need to take?  **Slide 14**  Show volunteering journey diagram and talk people through various stages. Highlight some of the key tasks in each stage. For example, selection. Completing registration form and informal interview, collecting references etc. **(8 minutes)**  Stress that all stages are equally important and that if the stages such as recruitment and selection are not done thoroughly this can cause issues later in the volunteer journey.  **In pairs, participants discuss what they are responsible for in their role and who does what at their property.**  For example, supporting volunteers in a task but not other aspects.  **Feedback**  Where are their gaps? Who is responsible for the most?  **(8 minutes)**   * Give an overview of current work streams supporting volunteer management.  slide 15Do people use the Volunteering Resource Bank on the Intranet? **Slide 16**  Highlight structures to support volunteering;  Regional Volunteering – who is this?    Central team – who are they – look at different roles. Show organagram.  **Explain that this information is in their Participant packs and details of external support available to people managing volunteers.** |  |
| 12.35 – 1.05 | **Applying the Volunteer Journey**  **(30 minutes)** | Share a case study of how the Journey is being used – In this case Working Holiday leaders.  Encourage the group to reflect on their own processes, which bits of the journey do they do well, which bits need improvement |  |

| **Time** | **Section** | **Notes** | **PP Slide** |
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|  |  | Get feedback from all the groups and highlight what they think is the most important and least important task.  Pick out some key tasks and expand on them together.  **Slide 17.**  Talk through the slide with the Essential Volunteering Standards on. It’s applicable to all volunteers. |  |
| 1.05 – 1.35 |  | **LUNCH (30 minutes)** |  |
| 1.35 – 3.05  Mike | **Practice session** | Explore range of scenarios to do with managing volunteers. Safe space to explore ideas and ways of working.  Ask whether people have brought their own scenarios and identify who has. Where possible use this session to discuss scenarios participants have brought and use the standard ones below to supplement.  **slide 18**  Use the example on the slide as an example and give participants two minutes in pairs to talk it through. Participants feedback and get them to verbalise what they would say to the volunteer.    **Important to feed in**:  Ways to improve – should have got back to the volunteer sooner. Should have taken notes and had more detailed questions. The role should have a role profile and ideally a person specification. Interview questions should be linked those qualities/competencies. For more information, participants should see new Selection and Induction guidance. Explain that there is an example rejection letter in the guidance and in the participant’s pack.  Split participants into three groups. Split the 10 scenarios between the 3 groups. Ensure that each group contains some people who have brought their own scenarios. Individual groups discuss and explore the scenarios. **(60 minutes).**  Trainer to go round and feed in any good practice and challenge poor practice. Also, make note of any points that should be fed back to the whole group  Ask groups to feed back on one of their scenarios. Encourage open discussion about the answers.  Facilitator to feed in issues.  **The list of scenarios are in the participant packs with key learning points highlighted.**  **Scenario 1 - Support**  You are responsible for supporting a team of volunteers in the NT shop. Most of your volunteers are older and have been with you for a long time, but recently you have recruited a younger person – Claire - to your team. Claire has an outgoing personality and really engages well with both the customers and other volunteers. Claire has lots of energy and is ready for every task – and gets involved in every part the work. If she sees that a job needs doing she gets on with it – brimming over with enthusiasm. However - some of the other volunteers on your team feel that they are being “pushed out” - they feel she is “taking over” and some are even talking about leaving! On reflection you can see that Claire has been doing some of the tasks that are allotted to other volunteers. You are aware that although many of these volunteers are older and perhaps do not have Claire’s energy, they have always been reliable and helpful and always get the jobs done in the end. You decide to have a chat to Claire and ask her to stay behind at the end of a session.  Talking Point   * What are the issues that need to be addressed? * What are the possible outcomes of the discussion? * What would you say?   **Scenario 2 – Recruitment**  I do not have a very diverse group of volunteers. All of them are over 50 and white. This does not reflect the people in the local community or those visiting the property. I need to recruit some more volunteers – list some ways I can recruit a more diverse mix of people.  **Scenario 3 – Selection**  I have seen the need for a Volunteer Supervisor role to help run group tasks in the countryside. I have a volunteer in mind for the role – do I need to develop a role description for the role? Should I advertise the role more widely? Do I need to interview the person for this role? Be prepared to give reasons.  **Scenario 4 – Dealing with a difficult situation**  Your property has just decided to do civil partnerships at the property. Bill, a volunteer, has approached you to say that he does not agree with the idea of civil partnerships and does not want to volunteer on a day when they are taking place. There is a civil partnership taking place next Friday – a day when he volunteers. He asks to swap days that week.  Talking Point   * What are the issues? * What would you say to Bill?   **Scenario 5 – Selection**  I have just interviewed a 15 year old boy, who would like to volunteer in the garden. Is he too young to volunteer? Do I need to complete any additional paperwork because the volunteer is a young person? Do I need to do anything else?  **Scenario 6 – Communication**  We recently conducted a volunteer survey at the property and many of the volunteers complained about communication saying they would like to find out more about property developments and the wider Trust. They also said that they would like the opportunity to feed into discussions. What ideas do you have about how we could improve things?  **Scenario 7 – Retention**  A quarter of our volunteers have left this year. They did a range of roles at the property but I am aware that we have never previously had so many volunteers leave and I am worried that there is an underlying problem. We have no idea why they left. I want to address this situation – what do you think I should do?  **Scenario 8 – Recognition**  We recently conducted a volunteer survey at the property and many of volunteers complained that they didn’t feel recognised for the time they give. What ideas do you have about how we could improve things?  **Scenario 9 – Promoting opportunities**  We offer volunteers a volunteer card when they have done 50 hours volunteering. I think this is great perk of volunteering. I am thinking about using this in my volunteer adverts to encourage more people to volunteer. Is that ok? Please give reasons for your answer  **Scenario 10** - **Induction**  I am new in role and am currently looking at induction for volunteers. It appears that very little induction has been given to volunteers. What do you think I should include in induction and is there any guidance on it? Why is induction important?  **Participants can get a drink mid-way through this session.** |  |
| 3.20 – 3.40  Mike | **The legal status of volunteers and staff**  **(the science bit)**  **(20 minutes)** | **Slide 19**  **Split the group into 3 teams All participants to think of qualities of a best boss and write them down on a post it and stick them up on the wall. (5 mins)**  Towards the end of the 5 minutes ask the teams to group the post its and summarise their ideas in 3 words.  **Ask group to list the differences between managing volunteers and managing employees.**  Discuss ideas and ask whether these characteristics make a good volunteer manager?  What is the difference between a volunteer and member of staff?  **Slide 20, 21**  Main point to summarise is this is quite straightforward but just to be **aware of the differences.** If you have any questions, speak to your VCI team.  Talk through the slides with the group. Stress the fact that volunteering is about flexibility, informality in the relationship with the Trust and their work should complement/not replace the work of staff – gives luxury of focus.  **Important to feed in:**  **Clarify steps to take to avoid risk. Highlight the points below;**   * Avoiding anything that could be seen as a payment for work would be a priority. Expenses payments should be a genuine reimbursement of out of pocket expenses.   Slide 22   * Training offered should be linked to the role that the person is carrying out, rather than a general perk or enticement to volunteer. For example, a Garden Volunteer who never uses a computer in their role going on an IT course because they want to improve their IT skills.   Slide 23   * Phrase the volunteer relationship in terms of expectation rather than obligation. For example, on role description with specific time commitment. * Avoid language that suggests employment, e.g. a role description/profile rather than job description. * Make sure that volunteers are treated fairly and consistently. |  |
| 3.40 – 4pm  Michelle  Mike | **End of course (20 minutes)** | Summarise key points from the day. Refer back to what people wanted to get out of the course. Check that their needs were met.  Remind participants of other courses available and how the course will be followed up (if applicable). For example, you may decide to send the all participants a follow up email with further information about specific issues that came up on the course. You may also want to send a separate email to the group one month after the course to see if they have progressed their action.  **Slide 24**  Put up slide and ask volunteers to answer the questions. Give out the feedback forms at the same time for volunteers to complete. Stress that this is a new course and so feedback is crucial. Go round the group while people are completing forms and get them to feed back their learning points. |  |
| 4.00 | **Finish** |  |  |