

What Paperwork Do I Need?

For just about any type of formal volunteering you are going to need some form of paperwork. The trick is to keep it practical, useable and readable. One key thing to remember for all volunteer documents is accessibility.

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

Task description

A role or task description gives a prospective volunteer a good idea of what will be expected of them, and clear guidelines once they are involved in the organisation. Don't consider them to be written in stone though.

Application form

One document that you might be able to do without, or at least slim down, is the application form. Many organisations use application forms that resemble ones you'd expect as an applicant for a paid job. Often this involves asking for information that they don't really need, or worse, that is intrusive. Generally if there's information you need to know, you can ask it at the interview stage.

Volunteer record file

You're going to need to keep some details about volunteers on file. Their contact details, details on who to call in case of an accident. All you really need to know is whether there's something you should be aware of in case of emergency or in terms of making it easier for the person to volunteer.

Apart from anything else, one of the key principles of the data protection is that only relevant personal information should be held. The two questions - is it necessary? Is it relevant? - are also ones to bear in mind when considering adding anything to the volunteers file at a later date.

Expenses form

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

Volunteer agreement

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

Volunteer Handbook



It might be worth considering putting together a volunteer handbook as a reference guide backing up the sort of information you give volunteers as part of their induction. While a volunteer policy might include issues such as equal opportunities, health and safety and so on, the handbook is a more informal guide to life as a volunteer in your organisation. The handbook is a good place to collect any full policies and procedures that you think volunteers should be possession of.

Disciplinary/grievance procedure

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

Exit interview


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

Volunteer Policy

A volunteer policy is a framework for a volunteer programme. The purpose of a volunteer policy is to give an overall cohesion to all the various policies and procedures that affect volunteers - recruitment, expenses, health and safety and so on. As such it helps define the role of volunteers within the organisation, and how they can expect to be treated.

There are a number of advantages in having a volunteer policy in place.

- It demonstrates an organisations commitment and care to its volunteer programme and its individual volunteers.
- It helps to ensure consistency. Dealing with volunteers means dealing with a diverse range of people. Being able to refer to a written policy ensures that decisions do not have to be made on an ad hoc basis, and that all volunteers are treated equally and fairly.

- A policy allows volunteers to know where they stand; it offers some security, in that they know how they can expect to be treated, and where they can turn to if they feel that things are going wrong. 
- It also helps ensure that paid staff, senior management and trustees fully understand why volunteers are involved, and what role they have within the organisation.

If your organisation has not yet started to work with volunteers it is the ideal starting point to consider exactly how you will involve them in your work, as it encompasses everything from recruitment to supervision and dealing with any problems that may arise.