

# Policies, procedures and systems

## Welcome to Handbook 2 of the Volunteer Development Handbook/Toolkit

The aim is to provide tested resources for supporting the development of a robust and compliant volunteer management programme. These resources have been compiled to complement **Handbook 1** and we hope that they are a useful addition to the checklists.

The aim of all the handbooks is to provide a set of tools that will support the development of a volunteering programme in a sustainable, achievable and **strategic way**. This should make it easy to assess what stage your volunteering programme is currently at, as well as offering guidance towards developing a strong volunteering programme.

The workbooks are based on the **Cotswold Canals Connected volunteer development strategy** - a vision for volunteering along the Stroudwater Navigation Canal that can be applied to any organisation involving volunteers.

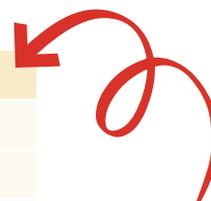
**Handbook 2** starts with some useful information and continues with three resource sections on policies, procedures and systems.

Please use or adapt the tables included to fit your needs.



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## 2.1 WHAT TO KNOW

It's a useful exercise to consider the following three essential specifics when considering a task or project; in this instance a volunteer development plan.

(Definition of a project: an individual or collaborative enterprise that is carefully planned to achieve a particular aim).

- **Roles and responsibilities** – Who does what?
- **Skills gap and training analysis** – Do the volunteers have the right skills and if not, how can they get them?
- **Review plan** – How to reflect on and implement learning as well as staying relevant and compliant?

### Roles and responsibilities:

Within any project, it is important to know **who is responsible** and **how are things communicated**. A RACI matrix, or chart, is a simple tool that helps make decisions in a way that is immediately clear and can be easily referred back to whenever necessary.



RACI is an acronym for responsible, accountable, consulted and informed.

<p><b>Responsible</b> Who is going to do the work?</p>	<p><b>Accountable</b> Who has to sign it off?</p>
<p><b>Consulted</b> Who needs to support with advice/ information?  (Two way communication)</p>	<p><b>Informed</b> Who needs to be kept in the loop?  (One way communication)</p>

**Roles** usually go at the top, e.g. the chair of trustees, volunteer coordinator or team leader. Each activity can be split into distinct **tasks**, all of which will need to have a role assigned to them with a person who is **responsible** (can be more than one) and someone who is **accountable** (ideally one).

**Consulting** is usually a two-way conversation which includes gathering more information or advice from someone who has experience or needs to have a say in the activity. If someone would like to stay **informed**, they are not actively involved in the process but would like to stay in the loop (e.g. by being copied into emails).



An example of a RACI matrix/chart looks like this:

	Role A: Chair of Trustees	Role B Volunteer coordinator	Role C Volunteer team leader	Role D Comms volunteer
Task: monthly newsletter	Informed (I)	Accountable (A)	Consulted (C)	Responsible (R)
Task 2: marketing budget	I	A	R	C
Task 3: small funding bid	A	R	C	C
Task 4: repair job	C	A	R	I

### Skills gaps and training needs

Once you know who is doing what, the next step is to check whether they have the **right skills** to carry out the task in an appropriate way.



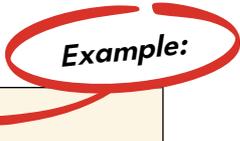
Where skills gaps are identified it's worth considering:

- How big is the gap between what they can do and are not yet able to do?
- Is there someone else who would be better placed in the short term to pick this up?
- Is the person generally capable but just lacks some practical skills, knowledge or experience?
- How can that gap be bridged and what training might support their personal development?

Skills can be **developed through**:

- Mentoring or informal training internal or external to the organisation
- Podcasts / YouTube videos
- Books, manual or journals
- Training course with or without certifications

A table with headings such as this will help focus and prioritise your needs.



What skills do we need/want?	What skills do we already have	Gap ratio Small/medium/large	What's needed to close the gap	By whom	By when

## Review plans

It is good practice to **regularly review** your policies and procedures - usually once a year but also if there have been any changes, e.g. new legislation, or if you notice that what you currently have in place is not working as it should. This way, your policies and procedures stay **current** and **compliant**.

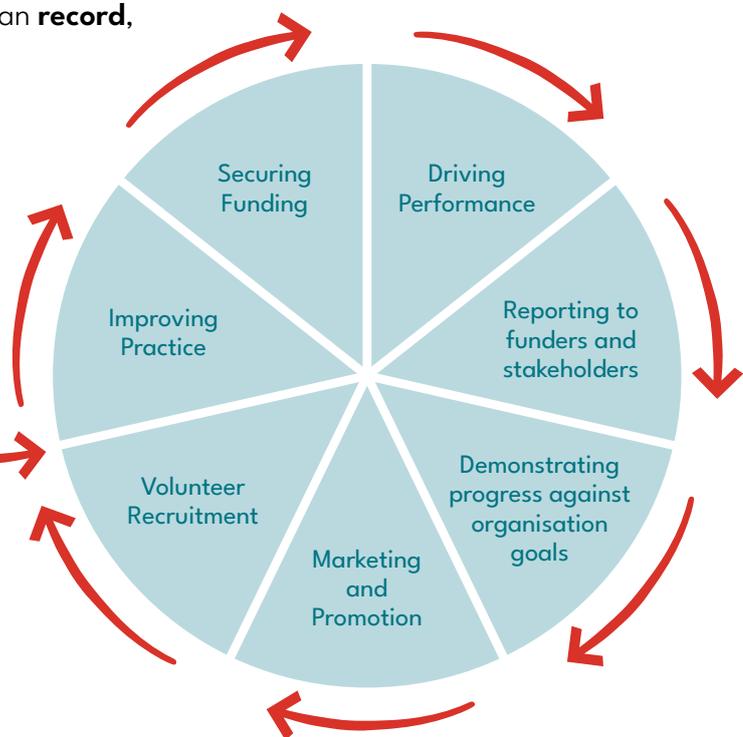
**Involve any stakeholders**, including volunteers, to make sure that the voices of all those affected are heard. Put **review dates** into your organisation's calendar and assign responsibilities.

## 2.2 IMPACT MEASUREMENT AND EVALUATION

Through measuring your impact, you can **record**, **analyse** and **communicate** the good work you are doing and, importantly, the difference you are making. This is valuable information for all stakeholders, including current and prospective volunteers, your board of trustees, partners, current and potential funders as well as the wider public.

Here are some **benefits** of measuring your impact of volunteering:

While **impact measurement** refers to the collection of data, **evaluation** is the assessment and interpretation of this data, so both are closely interlinked.



For more information:

<https://www.ncvo.org.uk/help-and-guidance/strategy-and-impact/>

<https://www.volunteerscotland.net/research-evaluation/evaluation-reports-and-toolkits>

### Theory of change:

You might want to develop a theory of change for your organisation. It is a tool for **strategic planning and impact measurement**.

For more information: [Theory of change in ten steps - NPC](#) (New Philanthropy Capital)

Another example can be found here: [Theory of Change for volunteer wellbeing](#)



### Change management tool:

Effecting appropriate but sensitive change management as an intrinsic element of the volunteer development programme is integral to achieving the strategic goals set out in the Volunteer Strategy (page 4). The ADKAR change management model provides a five-goal model to help organisations navigate change. It focusses on the individual and engagement aspects of implementing change.



**ADKAR change management model:** The ADKAR model, developed by Prosci founder Jeff Hiatt, formulates five main goals on which to base your change management process. There are several videos available to explain this model such as:

#### [What is ADKAR? The ADKAR Model of Change](#)

- **Awareness:** ensure everyone in your organisation (*project team & partner organisations*) understands the need for change
- **Desire:** make your case so that everyone involved wants the change
- **Knowledge:** provide the information each person needs on how to accomplish their part of the change process
- **Ability:** make sure all employees (colleagues and volunteers) have the skills and training they need to successfully do their part
- **Reinforcement:** continue to work with employees (*colleagues & volunteers*) and stakeholders after you accomplish a change to make sure they stay on top of doing things the new way

### Ripple effect mapping for evaluation:

This interactive, visually impactful and collaborative tool is specifically designed for evaluation in community-based programmes and projects. It will help to capture the impact of volunteering that is hard to measure or doesn't happen immediately.



#### [Measuring your impact — Vision for Volunteering](#)



#### Volunteer value and investment audit

This lets you calculate the economic value that volunteers provide as well as the costs associated with maintaining your volunteer workforce. More info and a useful spreadsheet:

#### [The Real Value and Cost of Volunteers | CharityConnect](#)

The Greater Manchester Cost Benefit Analysis is a sophisticated tool for calculating the fiscal, economic and social value of interventions. Although this might not be relevant to most, we have included it here 'just in case':

#### [Research: Cost Benefit Analysis - Greater Manchester Combined Authority](#)

### Reflection:

*Reflection: suggestions for discussion*

- In what ways do you measure your organisation's impact at the moment?
- What can you do to make this (even) better?
- What do you need to make this happen (resources, skills, steps to success)?



## 2.3 POLICIES AND PROCEDURES

Policies and procedures are the backbone of any organisation and the volunteering programme. As part of the planning process, it's worth spending the time considering your own and your organisation's values and principles, and how you are going to convey these to others through your policies and procedures.



### Policies and procedures are there to:

- Keep your volunteers safe and happy
- Make sure your organisation is compliant and working to best practice
- Set expectations and the tone you are working in
- Demonstrate best practice to volunteers, the public, funders...



Your charity **trustees** are usually responsible for writing, updating and upholding all policies. Although many are dictated by legislation (e.g. data protection), they should be **living and breathing guidelines** that are easy to read, understand and follow. They also need to be **communicated with everyone** who needs or wants to see them, e.g. with volunteers as part of their induction or the public via your website.

### Policies vs procedures

Policies and procedures go hand in hand; they can be in separate documents or combined into one. In short,

- policies outline rules;
- procedures specify how these rules are implemented, detailing the 'how' and 'who'.

For example, a safeguarding **policy** states the commitment of the organisation to the safeguarding and the legal frameworks it sets out to comply with; the safeguarding **procedure** outlines details regarding safer recruitment practices and the steps an organisation will take in case of any concerns. Whether this is communicated via one document or two, both inform each other.

The good news is that **you don't have to start from scratch**. We have collated links to reputable advice as well as sample policies that you can adapt for your own purposes.

The following policies and procedures are covered in this section:

Insurance	Expenses	Data Protection	Safeguarding	Equality Diversity Inclusion
Problem solving	Complaints	Code of conduct	Volunteer agreement	Health & Safety

## Insurance

You **must** have the right insurance in place for **all** your volunteering activities, especially if you are considering **new** activities that are outside of your usual scope; sometimes these can get **added to your insurance policy**.

Certain activities, e.g. power tools and machinery, might require the user to hold **certification** to be covered by your insurance.

If at all in doubt, **speak to your insurer**.

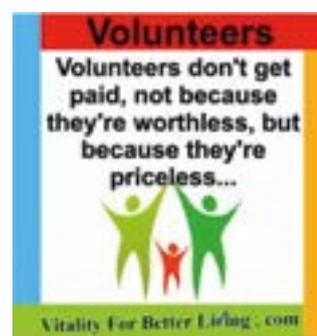
For more information visit: [Getting volunteer insurance | NCVO](#)

## Volunteer expenses

Volunteering often incurs costs for both the organisation and the volunteer - there are costs for both the organisation and the volunteer.

Volunteers should **not be 'out of pocket'**, and any reasonable expenses should be covered by the organisation. This includes:

- mileage to and from the place of volunteering
- training
- DBS checks
- personal protective equipment (PPE)
- childcare costs



Paying volunteer expenses helps to **reduce barriers** to participation and **shows appreciation** towards your volunteers. Be clear from the start what expenses you cover and what the process is for reimbursement.

For more information visit: [Paying volunteer expenses | NCVO](#)

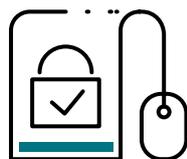
Consider practical ways of reimbursing expenses:

- what information or evidence do you need?
- how are claims submitted and paid?
- who is going to take care of the admin involved with this?

## Data protection and privacy notice

All charities need to comply with the **General Data Protection Regulation (GDPR)** which aims to protect people's personal data. You need to ensure that:

- you only collect the data that you need, for as long as you need it
- data is stored securely
- individuals can ask to see the data you hold of them and also ask to erase it



There are seven data protection principles which can be found here:

[A guide to the data protection principles | ICO](#)

You also need to bear GDPR in mind when **communicating** with your volunteers, e.g. bcc'ing (blind copying so recipients can't see who else has received the email) private email addresses or reminding people that their phone numbers will be visible when joining What's App groups.

A good, basic overview on data protection can be found here:

[Charity Finance Group | GDPR for Small Charities](#)

Most organisations need to be **registered with the Information Commissioner's Officer (ICO)** who oversees data protection in the UK; you might also have to **pay a fee** to the ICO – check here if this applies to you: [Advice for small organisations | ICO](#)

**Personal data** can be any information that identifies an individual, e.g. names, email addresses, IP addresses and photographs. **Special category data** is more sensitive and requires more safeguards as it can potentially cause harm to the individual if shared widely. This includes data revealing aspects like race, sexual orientation or health.

For more on this visit [What is special category data? | ICO](#)

Organisations should have a **data protection policy** as well as a **privacy notice** that they issue before people consent to giving their data.



More on writing the policy from the NCVO:

[Writing a data protection policy and procedures | NCVO](#)

and a handy policy template:

[Data Protection Policy: GDPR-ready Template For Membership Organisations - White Fuse](#)

**Generate a privacy notice** with the ICO privacy notice generator:

[Create your own privacy notice | ICO](#)

It is important to get data protection right; if you don't, it might impact the trust of your volunteers, your organisation's reputation or you might even be fined. The NCVO offers **courses** on data protection (fees apply): [Training and Events | NCVO](#)

## Safeguarding

Safeguarding is covered in detail in Handbook 3



### Equality (or equity), diversity and inclusion (EDI)

EDI is a constantly evolving topic, but in a nutshell, it is a **commitment to be open and welcoming to all people, no matter who they are.**

The legal framework is the **Equality Act 2010**, which protects people against discrimination because of **protected characteristics**:

- age
- disability
- gender reassignment
- marriage and civil partnership
- pregnancy and maternity
- race
- religion or belief
- sex
- sexual orientation

However, EDI is not just about complying with the law but about making sure that everyone has the opportunity to thrive, and understanding the **value** that having a diverse volunteer community brings. Your EDI policy shows your **commitment** to volunteers, partners, funders and the public. Volunteers should know **how it relates to their roles and what their responsibilities are**; this could also be expressed through your volunteer agreement, code of conduct and other policies and procedures.

For **definitions** of equality, equity, diversity and inclusion and more information on the topic: [Equity, diversity and inclusion in volunteering | NCVO](#)

Working towards EDI is a key responsibility for charity boards as set out in the **Charity Governance Code 6. Equality, diversity and inclusion — Charity Governance Code**

**Policy template: EDI policy.** Also see the policy here that incorporates definitions about the different types of discrimination: [Equity, diversity and inclusion | British Red Cross](#)



### Problem solving

Volunteering is based on mutual trust and serves both the volunteer and the organisation in equal proportions. No one expects there to be problems with a volunteer, but it is good to **be prepared** with a policy and procedure in case the need arises.

It is important to settle any issues **timely** and in an **empathetic** and **open** manner, to listen to all sides and try and resolve things informally. This might take time and energy but is part of good volunteer management. Letting conflicts simmer can lead to tensions, volunteers leaving and reputational damage. Dealing with conflicts constructively safeguards your volunteers and your organisation; as uncomfortable as it might feel while you are in it, it can also lead to valuable personal growth.

### Complaints

The complaints policy lays out who volunteers can contact if they would like to make a complaint and the processes this will trigger to deal with the complaint. A good template can be found here: [Complaint policy template](#)

### Code of conduct

See Safeguarding section in Handbook 3

### Volunteer agreement

The volunteer agreement sets out the **tone** of the relationship between the volunteer and organisation. It should include all the important **practicalities and behaviours** for both sides.



Your volunteer agreement sets out what volunteers can **expect from you**, e.g. an induction, any relevant training or supervision. Be realistic what you can offer and agree on.

However, it is an agreement between two sides, so it should also outline what your **expectations** are **of the volunteer** in terms of practicalities or behaviours, e.g. to be on time, be an ambassador for your organisation.

The volunteer agreement can be issued before or on the first day of volunteering. It should ideally be **signed** and kept in a **confidential folder** (e.g. scanned and stored in your volunteer management system). It becomes especially useful when paired with a role description if there are any problems with the volunteer’s behaviour or attitude further down the line. However, a volunteer agreement is **not legally binding** and needs to be written in a way that it cannot be confused with an employment contract.



Find out more: [Writing a volunteer agreement | NCVO](#)

Volunteer agreement template: [Sample volunteer agreement | Disability charity Scope UK](#)

### Skills gaps and training needs

Do those responsible for policies and procedures (these will be mainly trustees) have the right skills?

What skills do we need/want?	What skills do we already have?	How big is the gap between the two? Large Medium Small	What’s needed to close the gap?	Actions Who’s responsible, by when and any updates

## 2.4 SYSTEMS

Systems help you to be **compliant** and **efficient**. Compliance especially refers to the management of personal data according to the General Data Protection Regulation (GDPR), but it also comes into play if you need to record that your volunteers are trained or certified to use specific tools.

Although systems take time, energy and potentially money to set up and maintain, they also save time and enable faster and easier working processes.

As with everything else, systems should be appropriate to the needs of your organisation. The most important thing is that it works for you, and your volunteers.

This is what we’ll cover in this section:

Cyber security

Database management

Communication channels

Training records

Expenses reimbursement

Shared documents

Time recording and rotas

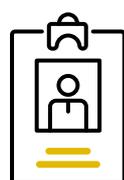
## Roles, responsibilities and training needs – refer to pages 3 & 4

Who is responsible for managing systems and data in your organisation?

**R** = Responsible      **A** = Accountable      **C** = Consulted      **I** = Informed

Task/system	Role 1	Role 2	Role 3	Role 4

Do they have the right skills or need any training (informal or formal) to perform these tasks? If not, how can they be upskilled?



### Volunteer management systems

Having the right systems in place will help you to record, access and manage your volunteers' data in a way that is appropriate to your organisation. Data usually includes personal details, emergency contact details, photo and other consent as well as training and certification records.

People who need access – and only those – need to be able to easily find the right information. This includes team leaders who might be working remotely.

#### Basic

Microsoft SharePoint or Google Workspace system; both offer free solutions for charities:

- Google for Nonprofits:  
[Google Workspace: Nonprofit resource centre - Google for Nonprofits](#)
- [Microsoft 365 Nonprofit Solutions | Microsoft Nonprofits](#)

Ensure volunteer data is secure by using restricted-access folders where required.

#### Pros:

- Most people are familiar with Microsoft or Google
- Free for charities
- Easy to set up

#### Cons:

- Lack of clarity as data is held in different spreadsheets
- No straightforward function for rotas

#### Advanced

- General CRM (Customer Relationship Management) systems, e.g. Monday.com (free for charities - [How To Master Volunteer Management | monday.com Blog](#))
- Systems specific to volunteer management:
- Rosterfy: [Volunteer Management Software | Rosterfy](#)
- TeamKinetic: <https://teamkinetic.co.uk>
- Assemble: [Volunteer Management Software | Access Assemble](#)
- Better Impact: [Better Impact](#)

Costs vary according to your number of volunteers and your needs.

**Pros:**

- Automated processes save time
- Data is held securely
- Easy communication with potential and current volunteers
- Appealing presentation of individual volunteer roles
- Overview of training and certification

**Cons:**

- Time-consuming to set up
- Expensive (unless you use free versions, e.g. Monday.com)

**Reflection**

- What system do you use at the moment? What are the pros and cons?
- What can you do to make this (even) better?
- What do you need to make this happen (resources, skills, steps to success)?

**Cyber security**

You need to make sure that **all your devices and systems are protected against cyber crimes**, including phishing emails, and that all volunteers and staff who might be targeted for a cyber attack (e.g. those having organisation's email addresses) have an awareness.



For more information see:

[Protect your charity from cyber crime - GOV.UK](#) and [Small Charity Guide](#).

Here is a free **30 minute training session** that would be useful for trustees and roleholders (e.g. as part of their induction) as well as a handy infographic summarising the training: [NCSC's cyber security training for staff now available - NCSC.GOV.UK](#)

Some questions for consideration:

- How do you ensure your organisation is protected against cyber crime?
- What can you do to make this (even) better?
- What do you need to make this happen (resources, skills, steps to success)?

**Communication with volunteers (in line with data protection)**

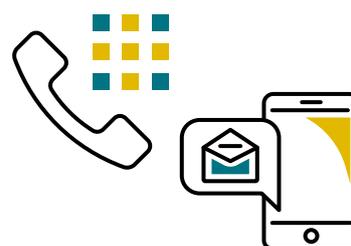
Communication with volunteers should always be a two-way conversation.

**How do volunteers contact you?**

Make sure that all volunteers know **who to contact** in different scenarios. This could be in your volunteer handbook or induction pack. If you are using private email addresses and phone numbers for role holders, make sure they have given permission to have these shared.

### How do you contact your volunteers?

- Email (direct)
- Email (via an email platform, e.g. Mailchimp, Brevo)
- Email (via volunteer management system)
- Phone
- Text message
- WhatsApp (everyone can post)
- WhatsApp (only admin can post)



### Q: Does this work well for you and fulfil both your and your volunteers' needs?

If you use platforms like WhatsApp, some things to consider in terms of safe management:

- important information is communicated effectively (and not lost within lots of irrelevant/unrelated posts)
- everyone is courteous (this comes under your safeguarding commitment),
- you foster a community spirit?

### Training and certification records



It is important to make sure that you have an **up-to-date record** of any training and certification relevant to your volunteering tasks. This is so that you comply with legislation and satisfy insurance requirements (e.g. in regards to machinery), to keep everyone safe and to uphold your own standards.

*You will have identified any training needs through your skills gap analysis, role descriptions, policies and risk assessments, including how often the training is required. It might form part of the induction process and is only needed once, or a refresher or re-certification is needed after a certain amount of time.*

Like all other data management, records should be appropriate to your organisation and need to be kept in a safe and confidential place.

A simple Excel/Sheets document might suffice – see an example below.

First name	Surname	Training course	Provider	Course date	Cost involved	Renewal required (y/n)	Renew by

How do you collect this information? Do you ask your volunteers to email you the information or can they submit it via your volunteer management system?

And how do you make sure that any certification is up to date?

## Rotas and time recording

Many organisations are dependent on volunteers being **committed** to volunteering at certain times, e.g. when providing services and working with beneficiaries. A rota gives the volunteer coordinator and volunteers a **quick and easy overview** of who is expected to be where and when.

A rota can be simply done on a spreadsheet shared with all stakeholders. Alternatively invest in a volunteer management software system with options to create a rota. On Microsoft Teams, Shifts can be used for that purpose.

Think about who can **access** and, importantly, edit the rota. Volunteers give their time freely and often juggle other commitments, so what are your expectations in terms of volunteers notifying you about absences?



A rota can also serve to **record volunteer hours**. This is useful when you need to confirm attendance but it also provides important data for measuring your impact (see Handbook 4) and communicating to volunteers, funders and other stakeholders.

## Shared documents

You might want to have a **place to store** shared documents – e.g. for your policies, rotas, procedures for claiming back expenses or contact details for key people in your organisation. These can be in stored shared folders on Microsoft Sharepoint or Google Workspace, or on your dedicated volunteer data management system. You might also consider creating a **volunteer handbook** which new volunteers receive when they start with you. These can be in printed and/or electronic format.



What are the key documents and other information that volunteers should have access to at all times?

*(The information provided in this document is for general informational purposes only and should not be considered as legal advice. It is meant to give a broad overview of volunteering best practice, and we cannot guarantee the accuracy, quality, validity, completeness or suitability of the material provided for any particular purpose.)*

*This document contains hyperlinks to other websites provided by third parties. We do not control these third-party websites or any of the content contained on those websites.)*

# Appendices

## Quick access to templates

### 1. Setting goals

	Relating to Establish, Grow or Experiment	Goal	Steps to achieve your goal
	<i>Grow</i>	<i>Establish good safeguarding practices across the organisation by the end of phase 1</i>	<ul style="list-style-type: none"> <li>• Review safeguarding policy</li> <li>• Update volunteer handbook</li> <li>• Include section about safeguarding in all role descriptions</li> <li>• Introduce training for all volunteers</li> </ul>
Phase 1			
Phase 2			
Phase 3			



## 2. Roles and responsibilities and review plan

Adapted RACI-style table for your policy roles and responsibilities; it can also serve as a review plan.

Policy	Who is responsible?	Who needs to be consulted?	Who needs to be informed?	To be reviewed by	Done?

## 3. Skills gaps and training needs

Do those responsible for policies and procedures (these will be mainly trustees) have the right skills?

What skills do we need/want?	What skills do we already have?	How big is the gap between the two? Large Medium Small	What's needed to close the gap?	Actions Who's responsible, by when and any updates

#### 4. Roles, responsibilities and training needs

Who is responsible for managing systems and data in your organisation?

**R** = Responsible

**A** = Accountable

**C** = Consulted

**I** = Informed

Task/system	Role 1	Role 2	Role 3	Role 4

#### 5. Safeguarding roles and training in your organisation

Role	Name(s)	Safeguarding training	Training date	Renewal by
Trustees				
Lead trustee for safeguarding				
Designated safeguarding lead				
Deputy safeguarding lead				

## 6. Your DBS and safeguarding requirements

Role	DBS check required?	If so, to what level?	Safeguarding training essential or desired	Training course
Trustee				
Team leader				
General volunteer				

## 7. Volunteer management roles and responsibilities RACI chart

Responsible – Accountable – Informed – Consulted

	Role W	Role X	Role Y	Role Z
Marketing				
Recruitment				
Induction				
Supervision				
Training				
Exit				

## 8. Your types and places of advertisement

Type of marketing	Place or business	Contact name	Contact details	Comments	Who is responsible?	Done?
Poster on noticeboard						
Website						
Social media						
Network						

## 9. Events you attend

Event	Date	Contact	Who is responsible?	What are you going to do?	What resources are needed?

## 10. Training plan

Example of a whole organisation training plan:

*Example:*

Skills outcome	Actions	Who is responsible?	Budget	Training format and provider	Progress
Enough first aiders to cover each team	Carry out annual audit to check numbers and renewals needed	Trustee/vol coordinator	£2000	In person xxx training company	Training booked for xx/xx/2025
All vols have adequate safeguarding training	Level 1 training mandatory for all new starters; refresher after 3 years	Vol coordinator	-	Online Local council	
	Safeguarding for trustees training mandatory for all new trustees			Webinar NCVO	

## 11. Networking

Name of the organisation/network	Area of work	Ways of working (e.g. email newsletter, monthly Zoom meeting, annual conference)	Contact	Costs involved	Who is engaged from your organisation?

## 12. Trustee training plan

Course	Essential or desired	Course provider/ location on the internet	Cost involved	Refresher needed	
Safeguarding					
Governance					
Finance					

## 13. Trustee recruitment RACI chart

Task	Role X	Role Y	Role Z	Time frame/ deadline
Skills audit				
Write/check/update all relevant documents				
Place advertisement				
Set interview date, decide on and invite panel				
Communicate with enquirers – have informal chat, send out application form, invite to interview				
Read applications and shortlist				
Interview				
Communicate interview outcome				
Recruitment checks (references, DBS)				
Induction process				