Creating a Volunteer Development Plan

Welcome to Handbook 1 of the Volunteer Development Handbook/Toolkit

The aim of all the handbooks is to provide a set of tools that will support the development of a volunteering programmes 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.
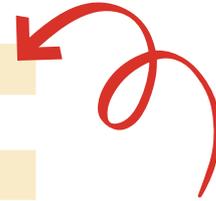
The workbooks are based on the **Cotswold Canals Connected volunteer development strategy** - a vision for volunteering along the Stroudwater Navigation Canal - but can be applied to any organisation involving volunteers.

The information in **Handbook 1** will help define what stage your volunteering programme is currently at and flag up any policies, procedures and systems it would be good to include going forward. At the end of Handbook 1 you should have a clear understanding of what your volunteer development plan already looks like/ will look like and have identified key areas to work on.

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1.1 DEVELOPMENT STAGES

To help focus on the present and the future we have divided volunteer development into **three stages**:

1. **Establish:** You build a good, solid foundation that ensures your volunteering offer is compliant and safe and meets the needs of your organisation as well as those of (potential) volunteers.
2. **Grow:** Building on your strong foundation, you grow your volunteer base, increase your impact and develop new partnerships.
3. **Experiment:** You test out innovative approaches to enhance your volunteer programme, reach out to new audiences and maximise your potential.

1.2 STEPS TO SUCCESS

These are the simple steps to creating a development plan:

Identify where you are now:

↪ Go to the **Establish checklist** and RAG (red – amber – green) code it.

↪ Go to the **Grow checklist** and either RAG code or mark those you are doing already.

↪ Look through the **Experiment list**. If you feel you are at that stage, make notes of what you are doing.

↪ Carry out a SWOT, which stands for strengths, weaknesses, opportunities and threats, analysis.

Once you have identified what policies, procedures and systems you already have in place think about what you need to action:

↪ Set your goals and timeline.

↪ Carry out a baseline survey of your current volunteers.

↪ The resources in handbooks 2,3, & 4 will support you along the way.

Who to involve?

Start with a small group of people – two or three who know the organisation well. Look through the lists together.

Further down the line, you will want to involve:
- Volunteer manager(s)
- Trustees
- Staff
- Team leaders
- Volunteers
- Other stakeholders, e.g. your beneficiaries

Ideally, gather a small steering group with people from across your organisation who are forward thinking and will be supportive of cultural change.

1.3   REVIEWING AND DEVELOPING

Use the three checklists below to identify what policies, processes and systems are already in place.

Start by working through the *'establish'* stage 1 checklist.

Stage 1 - Establish

The table below contains a list of aspects that represent good practice in volunteering. Depending on where you are with volunteering, this might be your starting point to **develop** all necessary policies and procedures – the resources in the second part of the handbook will support you with this. If you are confident that you have everything listed in place already, use this as an opportunity to **review** and, if necessary, **update** what you have, e.g. any policies and risk assessments. It might be worth saving or printing just the check list.

We suggest grabbing a cuppa and going through the questions; you might want to do this with someone else who knows your organisation well, e.g. a volunteer coordinator or trustee.

RAG (red, amber, green) colour coding the rows will help to give you an overview of where you are (and keep track of changes).

Red	**Amber**	**Green**
Missing/ inadequate	Update or work in progress	Accomplished/ in place

Checklist Stage 1

(Suggestion: print or save this checklist as a separate document and have handbooks 2,3 and 4 open to refer to designated resources)

Topic	Resource reference	HB ref	RAG status
Policies and procedures			
Is it clear who is responsible for policies and procedures in your organisation?	**Roles and responsibilities and review plan**	HB2 HB2	
Do those who are responsible have the right skills? Do they need any training?	**Skills gaps and training needs**	HB2	
Do you have the right insurance that covers all of your volunteering activities?	**Insurance**	HB2	
Do you cover volunteer expenses? Is this written down in a policy?	**Volunteer expenses**	HB2	
Do you have a data protection policy and privacy notice?	**Data protection and privacy notice**	HB2	
Do you have a safeguarding policy?	**Safeguarding policy and procedures**	HB3	
Do you have a policy covering Equity, Diversity & Inclusion? It might have a different name.	**Equality (or equity), diversity and inclusion (EDI)**	HB2	
Do you have a problem-solving policy and procedure for when things go wrong with a volunteer?	**Problem solving**	HB2	
Do you have a code of conduct that all volunteers have to adhere to?	**Code of conduct**	HB2	
Do you have a volunteer agreement?	**Volunteer agreement**	HB2	
If you have volunteers working on their own, do you have a lone working policy?	**Lone working policy**	HB3	
Do you have a robust risk assessment process?	**Risk assessment**	HB3	
Do you have processes of what to do in case of an accident?	**First aid and accident procedures**	HB3	
Do you have a process for signing in and out of activities on the day? This might not be applicable to you.	**Signing in and out procedures**	HB3	

Topic	Resource reference	HB ref	RAG status
Do you have a plan in place to review your policies regularly - at least once a year, after an incident or when there are new rules and regulations?	**Roles and responsibilities and review plan**	HB3	
Systems and volunteer communication that are in line with data protection and cyber security			
Is it clear who is responsible for setting up and maintaining systems?	**Roles, responsibilities and training needs**	HB2	
Do those who are responsible have the right skills? Do they need any training?	**Roles, responsibilities and training needs**	HB2	
Do you apply cyber security principles? Is everyone aware of how to keep your organisation safe from cyber attacks?	**Cyber security**	HB2	
Do you have an efficient management system for all your volunteer data? Is it in line with data protection, keeping volunteer data safe?	**Volunteer management software**	HB4	
Do you have all necessary data about your volunteers, including emergency contacts?	**Volunteer data**	HB4	
Do you have all necessary consent forms in place, e.g. about holding their data, taking photos/videos?	**Consent forms**	HB4	
Do you have a system to record and keep track of training and certification records?	**Training and certification records**	HB4	
Do you have a system to record volunteer hours? Do you have a system for volunteer rotas?	**Time recording and rotas**	HB4	
Do you have a system to reimburse expenses?	**Reimbursement of expenses**	HB4	
Do you have a way of sharing documents, e.g. handbooks, risk assessments, policies?	**Shared documents**	HB4	
Do you have efficient communication channels to communicate with volunteers (two ways) that are in line with data protection and safeguarding?	**Communication with volunteers (in line with data protection)**	HB4	

Topic	Resource reference	HB ref	RAG status
Do you review your systems on a regular basis?	**Review plans**	HB4	
Safeguarding			
Do you have a designated safeguarding lead? Do you have a lead trustee for safeguarding?	**Roles and responsibilities**	HB3	
Do you have role descriptions for these roles?	**Roles and responsibilities**	HB3	
Are your trustees fully aware of their safeguarding responsibilities?	**Roles and responsibilities**	HB3	
Have you got a training plan for safeguarding that covers the different roles and responsibilities in your organisation?	**Safeguarding training**	HB3	
Do you have a safeguarding policy that includes: • Reference to legislation • DBS checks • Roles and responsibilities • Training (incl. refreshers)	**Safeguarding policy and procedures**	HB3	
Do you use safer recruitment practices when recruiting volunteers, trustees and staff?	**Safer recruitment practices**	HB3	
Do you have a system in place to carry out the right level of DBS checks for all who require them? Keep a record and know when they need to be renewed?	**DBS checks and renewals**	HB3	
Do you review your safeguarding policy at least annually, after an incident or when new rules and regulations have come in?	**Safeguarding policy and procedures**	HB3	
Do you communicate your safeguarding commitments, your policy and procedures to new and existing volunteers?	**Safeguarding training**	HB3	

Topic	Resource reference	HB ref	RAG status
Volunteer management			
Do you have an organisational chart of your organisation with clear lines of responsibility?	**Organisational chart**	HB4	
Is it clear who is responsible for volunteer management? In the broadest sense, this covers planning, marketing, recruitment, induction, training, support and evaluation and can be covered by several people.	**Roles and responsibilities**	HB4	
Do those who are responsible have the right skills? Do they need any training?	**Skills gaps and training needs**	HB4	
Do you have role descriptions for role holders, including essential training?	**Role descriptions**	HB4	
Marketing			
Do you have up-to-date contact details so potential volunteers can get in touch? This should include an organisation's email address and phone number.	**Contact details**	HB4	
Do you have an up-to-date and attractive volunteer page(s) on a website? This can be your website or a volunteering platform.	**Recruitment via online channels**	HB4	
Recruitment (including trustees)			
Do you have standardised recruitment processes? Is there some flexibility to include people with different support/access needs?	**Recruitment process**	HB4	
Do you have an application/registration form that captures volunteer data?	**Application form**	HB4	
Do you ask for references? This might not be applicable for all roles.	**Safer recruitment, incl. references**	HB4	
Do you have a standardised interview process? Is there some flexibility to include people with different support/access needs?	**Interviews**	HB4	

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Topic	Resource reference	HB ref	RAG status
Induction			
Do you have a specified 'induction journey' for all new volunteers?	**Induction**	HB4	
Do you have induction and training plans for all role holders?	**Induction**	HB4	
Training and development			
Do you have a budget for volunteer training and development?	**Training and development**	HB4	
Reward and recognition			
Have you established ways your volunteers would like to be rewarded?	**Reward and recognition**	HB4	

Review

Once you have worked through the first checklist we recommend reviewing and noting any gaps before moving on.

Stage 2 - Grow

The next check list builds on the previous one. Depending on your situation, you might already be doing some or most of these, or they are aspects to build into your development plan.

We suggest RAG coding this as well, especially if a lot of your Establish list looks green or amber, otherwise just indicate those you are doing already.

Stage 2 checklist
(Suggestion: print or save this checklist as a separate document and have handbooks 2,3, & 4 open to refer to designated resources)

Topic	Resource reference	HB ref	RAG status
Volunteer Management			
Do you have training and induction plans for all roles?	**Induction**	HB4	
Do you offer support and supervision for role holders?	**Support and supervision**	HB4	
Communication and feedback channels (including surveys, polls…)	**Communication with volunteers (in line with data protection)**	HB2	
Are you aware of the Investing in Volunteers standard?	**Investing in Volunteers**	HB4	
Do you have standardised exit procedures?	**Exit procedures**	HB4	

Topic	Resource reference	HB ref	RAG status
Marketing and communication			
Do you consider accessibility in all your communication? This could be with your volunteers or others.	**Clear communication**	HB4	
Do you use targeted marketing (internal or external) to recruit volunteers for specific roles?	**Recruitment**	HB4	
Do you advertise roles that are more accessible, e.g. that can be carried out from home?	**Recruitment**	HB4	
Do you have volunteer recruitment materials? This could be posters, fliers or a stall.	**Design of recruitment materials**	HB4	
Do you have a list of places and contacts to advertise your volunteering offers?	**Your types and places of advertisement**	HB4	
Do you have a social media presence and actively engage through it?	**Recruitment via online channels**	HB4	
Do you attend events to recruit new volunteers?	**Recruitment via physical materials and in person**	HB4	
Recruitment			
Do you monitor demographics of new volunteers and where they have first heard about the opportunity?	**Monitoring**	HB 4	
Induction			
Do you have a volunteer handbook that every new volunteer receives, containing all the important information?	**Volunteer handbook**	HB4	
Training and development			
Do you have a training plan for your organisation?	**Training plans**	HB4	
Do you make the most of your volunteers' skills, e.g. through peer-learning opportunities?	**Peer learning**	HB4	

Topic	Resource reference	HB ref	RAG status
Wellbeing			
Do you have someone in your organisation who has mental health awareness training or is a Mental Health First Aider?	**Wellbeing**	HB3	
Do you consider the needs of your volunteers in every role? Are all roles distinct in their character as volunteer, not paid roles? Do you make sure volunteers won't 'burn out'?	**Wellbeing**	HB3	
Volunteering for all			
Do you actively commit to include a wide variety of people in your volunteering offer?	**Accessibility**	HB4	
Inclusion training			
Are you able to identify your stakeholders and those who are not currently present?	**Volunteering for All**	HB4	
Have you done a formal or informal accessibility audit (involving people with lived experience)?	**Accessibility**	HB4	
Do you trial and evaluate sessions with new audiences?	**Volunteering for All**	HB4	
Impact measurement			
Do you have systems in place to measure impact on a basic level (e.g. vol numbers, hours)?	**Impact measurement**	HB2	
Networking, membership and support			
Are you a member of national support agencies, e.g. National Council for Voluntary Organisations (NCVO) or the Association of Volunteer Managers (AVM)?	**Networking, membership and support**	HB4	
Do you subscribe to relevant local and national newsletters, e.g. NCVO, Gloucestershire VCS Alliance?	**Networking, membership and support**	HB4	
Do you attend local networking opportunities, e.g. Know Your Patch?	**Networking, membership and support**	HB4	
Do you trial collaborations with other local organisations?	**Volunteering for All**	HB4	

Review

We recommend reviewing and noting any gaps before moving on to the final stage.

Stage 3 - Experiment

At this point the activities start to become more specialised for different organisations, so here are some ideas to further enhance your volunteering programme.

Systems and communication
- Consider having a comms plan (if there isn't one already in place) to communicate with current and potential volunteers in a strategic way.
- Volunteer management (see Handbook 4 for details)
- Go for the 'Investing in Volunteers' accreditation. **Investing in Volunteers**
- Offer support and supervision for all volunteers. **Support and supervision**

Recruitment
- Reach out to potential volunteers through broad recruitment, including through 'You're Welcome', employment guides, social prescribers, mental health guides.
Inclusive recruitment

Training and development
- Consider implementing a 'train the trainer' approach – this could be just for your organisation or through collaboration.
- Develop ways to keep heritage skills alive. What can be learnt from other organisations? How can you tap into your current volunteers' skills?

Volunteering for All
- Look at ways of accrediting your volunteering programmes.
Accredited learning programmes
- Involve young people in your organisation. **Youth Volunteering**
- Offer opportunities for placements and work experience.
Placements and work experiences
- Involve families in your volunteering. **Family volunteering**
- Set up micro-volunteering opportunities for those who have little time and/or cannot commit to volunteer regularly. **Micro-volunteering**
- Explore employer-supported volunteering. **Employer-supported volunteering**

Impact measurement
- Set up systems to measure your impact on an advanced level (e.g. case studies, ripple effect, monetary value of volunteering). **Impact measurement**

Partnerships
- Share resources with other organisations, e.g. volunteers, equipment, training.
- Explore the idea of 'passporting' to allow volunteers to be involved in numerous organisations.
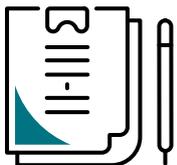
Next steps: creating a volunteer development plan

Having worked through the three stages we hope you have arrived a clear understanding of what is already in place and what gaps there are in terms of achieving best practice. At this point it is worth considering a timeline for creating your volunteering development plan.

1.4 NEXT STEPS - CREATING A VOLUNTEER DEVELOPMENT PLAN

Timeline / Three-year plan

The handbook can help by providing samples and templates, but you need to be realistic about your timeline, especially if it involves any change to the culture of the organisation. Consider having a three-year plan, e.g.

Year1

Stage 1 completed ...agree action plan in progress

Year 2

Stage 2 identified areas for potential development

**Year 3**

Ongoing consolidation and development

As a rough guide aim to work towards the following milestones and progression of a comprehensive and supportive volunteer development plan.

It will help to split your plan into **three phases** in order to tackle the three stages *Establish*, *Grow* and *Experiment*. Get a good foundation through *Establish*, grow your volunteer base and impact through *Grow*, then reach out and thrive through *Experiment*.

Splitting these up over three phases ensures that you are not jumping ahead but also keeps it ambitious and have fun and variety along the way. Each of these phases could be **one year but could also be longer or shorter**.

What you do in each of the phases depends on your starting point. Below are **two examples**. If after looking at the *Establish* list a lot of it is red or amber, your timeline might look a bit like the chart on the left. If your *Establish* and *Grow* stages are more or less covered already and your focus is on experimentation, e.g. with training and/or new audiences, it might look more like the one on the right.

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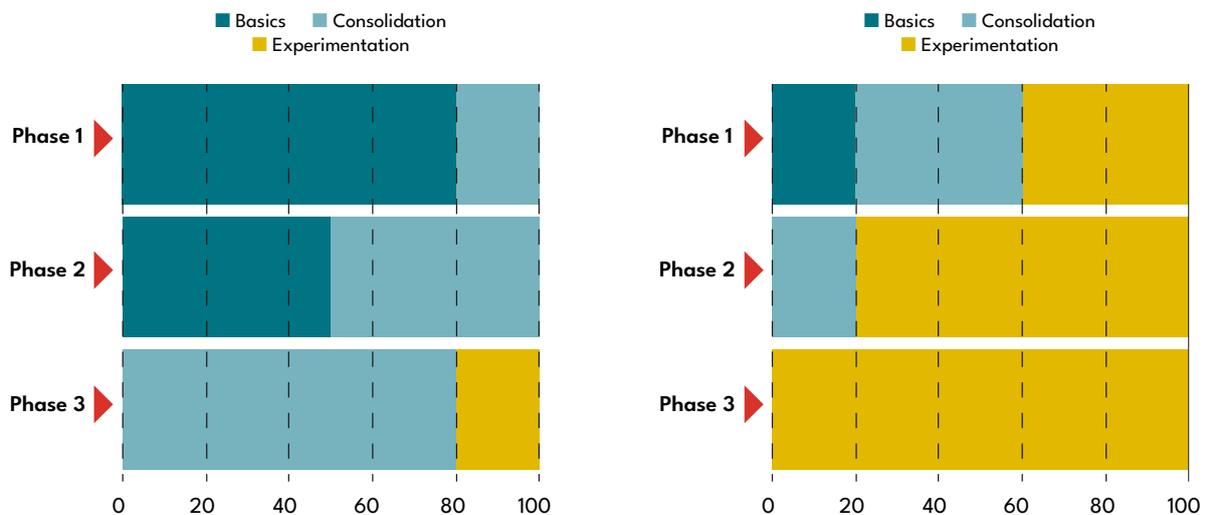
Set your timeline

Set how long each phase is going to be. You can customise the chart below (if you are using Microsoft Word, you can double-click on the chart to change the values) or make your own representation of a timeline that works for you.
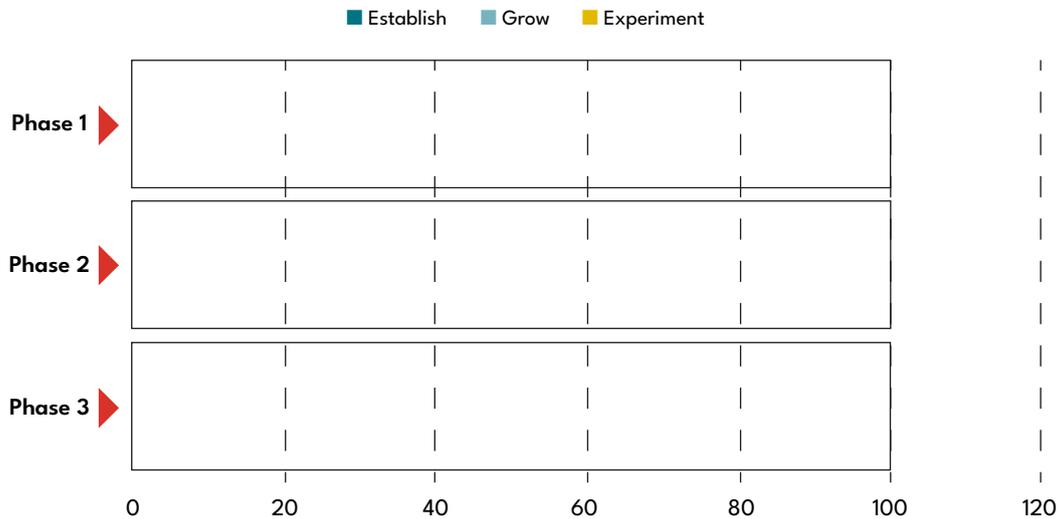
Set your goals

Alongside your timeline, you need to set some goals. Any goals should be **SMART**:
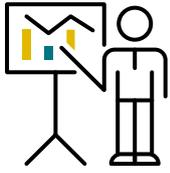
- **S**pecific
- **M**easurable
- **A**ttainable
- **R**elevant
- **T**imely

Below is a suggested template for setting goals:

	Relating to Establish, Grow or Experiment	Goal	Steps to achieve your goal
Example:	*Grow*	*Establish good safeguarding practices across the organisation by the end of phase 1*	*Review safeguarding policy* *Update volunteer handbook* *Include section about safeguarding in all role descriptions* *Introduce training for all volunteers*
Phase 1			
Phase 2			
Phase 3			

Baseline data

Gathering baseline data is a really useful exercise when you are setting out your goals. Baseline data can be, e.g., volunteer

- numbers
- demographics
- hours
- tasks etc.

You might be able to pull this information out of existing data sets. You can also carry out a **survey** amongst your volunteers to capture these as well as **their views** on their volunteering experience, e.g. what is going well or could be improved. Additionally, this can be an opportunity to ask about **ideas and aspirations**, e.g. any training or roles they might think would be beneficial.

The baseline data and the goals you set should inform each other. Having this data will also be **invaluable to look back on** to compare with data gathered farther along your volunteer development journey. For more information on this, please see the impact measurement and evaluation section.

Some useful tools

Finally, we would like to highlight ideas for different tools that you may or may not already be familiar with that can be used to help define those 'next steps':

- summarise action points
- draw up a list
- use a mindmap
- create a graphic
- have SMART objectives
- carry out a SWOT analysis
- SWOT analysis

Doing an **honest assessment of your current situation** about your volunteering offer and volunteer management will help frame your volunteering development plan. A useful tool for this is a **SWOT** analysis. **SWOT** stands for strengths, weaknesses, opportunities and threats.

Strengths	**Weaknesses**
Opportunities	**Threats**

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Try and involve different perspectives to get a comprehensive picture, e.g. from trustees, your volunteer coordinator, team leaders and general volunteers. You can use this template to record your thoughts.

This completes Handbook 1 of the Volunteer Development Handbook.

For all resources highlighted in both checklists refer to Handbooks 2, 3 & 4 of the Volunteer Development Handbooks.

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