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The NCVO Members Quick Guide to

# MANAGING AND RETAINING VOLUNTEERS

Creating the right environment

Recognition and reward

Dealing with challenging volunteers

Saying goodbye

Case studies

*NCVO champions and strengthens the voluntary sector, from the largest charities to the smallest community organisations. Inspired and empowered by over 10,000 members, we make sure the voluntary sector can do what it does best: improve the world around it.*

This guide was produced for NCVO members. It should only be shared within your own organisation.

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In Quick Guide 7 we looked at ways to attract and recruit the right volunteers, and get them ready to start. The focus now moves beyond the initial induction, as we consider what you need to do to support volunteers as their involvement continues and changes with you.

We'll also be considering those volunteers who have been with you for some time. Experience is a fantastic attribute for any team member, but it can also present its own challenges. Being able to keep your seasoned volunteers engaged, motivated and on your side will allow you to reap the benefits of retaining all that knowledge and experience.

This Quick Guide gives expert advice on what a charity needs to do to get the best out of their volunteers, how they can keep volunteers involved and how to manage challenging situations. It also signposts to further information and support, much of which is free.

# Creating the right environment

The fact that your volunteers have decided to give you their time and skills for free should not lead you to think that they always will, or that they will always do so with the required motivation. Many factors might alter their outlook: a change in their professional or family life; an interest in another cause; they might have become disengaged with your mission; or it might simply be that they don't feel valued.

While not all these factors are under your control, creating the right environment for your volunteers will give them a stronger inclination to work harder and stay longer. Ideally, the environment you create should reflect the culture of your organisation, club or group. The following provides an overview of the sorts of things you should be considering when creating the right environment.

- Keeping in regular contact with your volunteers will make them feel more central to your mission. This may be as simple as a regular phone call or, where appropriate, sharing staff communications and internal briefings with them. Ensuring that communication is two way can unearth exciting new ideas, or provide early warning of potential issues. Making sure

volunteers know who to turn to for support or to raise an issue can avoid difficult situations and improve the ways you work together.

- Help your trustees – who are volunteers themselves – see the importance of volunteers for your organisation (through regular reports and stories, for example) and to express their appreciation of all that volunteers do.
  - Fostering a sense of community and collaboration amongst your volunteers not only provides a support network, but also a forum for sharing knowledge. Hosting local get-togethers can be a great way for volunteers to make friends, catch up and swap stories. If you have a large and disparate volunteer network or want to facilitate ongoing interaction, then an online solution may work better: this may be a space on your organisation's intranet or through a social network, such as Google+, LinkedIn or Facebook.
  - Recognise that volunteers are involved for many different reasons and motivations. Some may simply want to feel useful or work in a friendly atmosphere, but some may be looking to fulfil themselves in ways that they can't in their paid work.
- If your volunteers are with you predominantly to develop their own skills, then provide them with constant opportunities to challenge and stretch themselves in the relevant areas. Bear in mind that their development needs may change over time without your knowledge, so ensure that these people feel comfortable approaching you to identify new remits and responsibilities.
  - Let volunteers feed into policy and campaign plans; you could ask them to complete a quick online survey of their thoughts or invite them to sit in on meetings. This isn't about lip service – volunteers often work on the front line, and their insights can be very valuable.
  - Make sure that volunteers are promptly reimbursed for any out-of-pocket expenses covered by your policy; they may not ask for any money, but neither will they want to be out of pocket.
  - Asking an experienced volunteer to mentor a new recruit can not only be a great tool to develop the mentee's knowledge and confidence, but it can also provide the mentor with a sense of pride and a renewed focus.

**Top tip** Before you go ahead with creating an online community for your volunteers, think about how much control you want – it might be wise to moderate comments and be able to respond to what is written.

## Case study 1

'At SeeAbility we greatly value and appreciate the time, skills and experience our 250 volunteers bring to enrich the lives of people with sight loss and multiple disabilities.

'Our volunteer co-ordinators work hard to match the right volunteer with the right person so both have an enjoyable experience, and this helps build trust and loyalty. We also provide training specifically designed for volunteers to ensure they have the necessary skills and confidence to undertake their roles.

'We also place great emphasis on regularly monitoring how each volunteer is enjoying their role, and recognise their commitment with one-, three-, five- and ten-year awards. We've also recently launched our "Volunteer of the Year Award" alongside our staff awards, and this has been well received.'

Jayne McGann, director, SeeAbility

NCVO member since 2012

# Recognition and reward

At the most basic level, volunteers should always feel that the charity is grateful for their efforts, and formally communicating that gratitude can be an important way to get your sentiment across.

Every volunteer should receive regular, individual feedback, be it through a written appraisal or an informal chat. This is the perfect avenue to shine a spotlight on your volunteer's achievements.

More generally, you can praise your entire volunteer force with a letter or email of thanks from your chief executive or chair. Volunteers' Week, which takes place at the start of June each year, is a good time to do that. If your charity produces an annual report, that's a perfect place to amplify that acknowledgment, and more regular communications, such as newsletters, could also be a place to say thank you. But you don't need to wait until specific moments in the year to say thanks – a social media post can be just as effective.

For many volunteers, that may be reward enough. But you may also like to publicly single out certain volunteers for special praise every

now and again. This approach is not just about looking after your stellar performers; seeing 'one of their own' celebrated can also be a morale boost for your wider volunteer community.

## Awards and accreditation

As well as internal recognition, there are a number of public awards that you can nominate your volunteers for.

- The Queen's Award for Voluntary Service is the highest award given to volunteer groups across the UK. [bit.ly/16eM592](http://bit.ly/16eM592)
- The vInspired Awards are a recognition scheme for volunteers aged 14 to 25, and are specifically designed to demonstrate the skills and impact of young people to colleges, universities and potential employers. [bit.ly/188vWXm](http://bit.ly/188vWXm)
- The UK's official honours system regularly includes volunteers among its recipients. [bit.ly/1a3KSFG](http://bit.ly/1a3KSFG)
- Formal accreditation is not only a form of recognition, but also provides your volunteer with qualifications that they can

use elsewhere. Accreditation schemes can be provided in-house, if you have the resources to develop learning and assessment tools. More commonly, charities will use external accreditation programmes, such as NVQs.

NCVO has an information sheet that looks at all the benefits and considerations of volunteer accreditation, including a thorough list of external accreditation schemes. [bit.ly/1epdDBD](http://bit.ly/1epdDBD)

# Dealing with problems or issues with volunteers

As important as reward and recognition is dealing with problems or issues with your volunteers. If it's a case of willingness without the ability, then you can look at simplifying their responsibilities, providing additional training or mentoring support, or suggesting a different role (if appropriate). Sometimes, and hopefully very rarely, the challenge is one of attitude. It's important to address such challenges early to ensure that it doesn't develop into a bigger issue or problem.

Volunteering is an arrangement of mutual benefit between the charity and the volunteer. It's therefore reasonable that you, as a charity, group or organisation, should have a reasonable and fair process for working through problems and issues with volunteers.

It's important to remember that volunteers should not have a formal contract with your organisation, and therefore employment law does not apply. However, in order to ensure all volunteers receive the same treatment, you may wish to put your process of dealing with problems in writing. This can be helpful for volunteers and staff in ensuring everyone is aware of how problems will be addressed. It is advisable to have a process that allows you to respond to problems at different levels, depending on how serious they are.

In the first stage, it may be sufficient to deal with the problem informally by speaking openly with the volunteer. They may want

**Top tip** Many external accreditation schemes require a level of input from the charity in addition to the support you would normally provide your volunteer, such as developing and assessing new skills that fall outside the volunteer's role description. Make sure you have the resources to cope.

## Dealing with problems or issues with volunteers

### *continued*

someone to accompany them to a meeting, but it's important they have the opportunity to speak for themselves. Reassure them that the aim is not to discipline them, but to ensure they are supported in their role. If it's a problem with how they are carrying out their role or conducting themselves, you could refer to advice they were given at induction, or guidance in a role description or any training they have received. This way you can try to guide and support them to improve their performance or behavior in a gentle, non-judgmental way.

If the problem persists, you may wish to hold a more formal meeting between the volunteer and another more independent member of your organisation. This could be someone more senior who is ideally not directly involved in managing the volunteer. You may also want to notify the volunteer in writing about what the problem is and what the outcome of the meeting was. More serious issues might require you to skip the informal stage and move directly to this one.

When dealing with issues and problems with volunteers, you should consider whether the volunteering role they are in is right for them. This could form part of your discussions with the volunteer. They may feel that the role is too challenging, which could explain why they aren't performing well, or they may not be comfortable with other volunteers or staff. Sometimes a change in role or location may help to deal with the problem.

The aim of this kind of process is to remedy the situation early, so that the volunteer can be retained; critical to its success is monitoring and following up at each interval. Consider what feels appropriate for your organisation and the types of volunteering roles you have.

If you are not able to resolve the issue, it may be best to say goodbye to that volunteer. If you have discussed the issue openly and followed a process that has given the volunteer an opportunity to deal with their problems, then although they may be disappointed, they will hopefully leave feeling that they have been treated fairly.

The Volunteer Rights Inquiry, set up by Volunteering England, produced the '3R promise' to help organisations adopt good practice and raise standards of volunteer management. [bit.ly/19eDOnc](https://bit.ly/19eDOnc)

## Saying goodbye

For many reasons it can sometimes be time to say goodbye to your volunteer. This can be an emotional time, both for the volunteer and the charity, but it's also a great opportunity to get some valuable insight.

Exit interviews, questionnaires or informal chats might reveal issues in your organisation that need addressing, or confirm areas of strength. This final stage is particularly important if you feel or know that the volunteer is leaving prematurely because of unhappiness or frustration.

The questions you ask should be designed to elicit both positive and negative comments, so be brave. And be creative with your wording – here are a few less obvious questions, which might result in more useful feedback.

- If you knew what you know now, would you still have joined us?
- How do you think the charity has changed during your time with us?
- Would you recommend us to someone looking to volunteer?

- If you became our chief executive tomorrow, what three things would you immediately do?
- Which three people have most impacted on your time with us?
- After you leave us, will you be volunteering with any other charity?

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**Top tip** As exit interviews are most valuable when the volunteer feels they can speak candidly, the most effective ones are often conducted by someone they don't know.

## Case study 2

'I've been a volunteer receptionist with Beacon since 2007, and work at their Stockport office about three hours, one evening per week. Despite this relatively small time commitment, Beacon always strive to make us feel a real part of their team. We are kept in the loop with everything that is going on through regular newsletters, and have a chance to feed in our ideas at their AGMs. When they won their Queen's Excellence Award for Volunteering a few years ago, they made sure that we were a big part of the celebrations, and I know that we all felt motivated by this very public display of gratitude. But just as important are the small thanks we get every day.'

Janey, volunteer, Beacon Counselling

NCVO member since 2007

# More information and advice

## Your member benefits

### 20% off NCVO Consultancy

We provide a range of consulting, training and coaching support on areas such as volunteering, sustainable funding, governance, and leadership development.

We recognise that the needs of each organisation are unique and pride ourselves on our ability to work alongside our clients, building rapport and tailoring our approach to deliver real impact.

[bit.ly/14KWRHp](http://bit.ly/14KWRHp)

### Volunteering information sheets and Quick Guides

Visit the members' area of the NCVO website to download exclusive information sheets on topics such as monitoring and evaluating a volunteer programme, problem solving procedures and volunteer expenses, as well as NCVO Members Quick Guides on recruiting and thanking volunteers.

[bit.ly/1bShNOB](http://bit.ly/1bShNOB)

### NCVO Members Helpdesk

Information and signposting from our Helpdesk team over the phone, through live chat or by email. Open 10.00 to 16.00, Monday to Friday (excluding bank holidays).

[www.ncvo-vol.org.uk/helpdesk](http://www.ncvo-vol.org.uk/helpdesk)

0300 0120 179

## Other NCVO resources

### Email newsletters

Get regular bulletins on a range of topics, including volunteering

[www.ncvo-vol.org.uk/signup](http://www.ncvo-vol.org.uk/signup)

### Good Practice Bank

A comprehensive library of resources for volunteer managers and volunteers.

[www.volunteering.org.uk/goodpractice](http://www.volunteering.org.uk/goodpractice)

### KnowHow NonProfit

Expert advice and support, practical how-to guides and video training courses on all aspects of voluntary sector management.

[www.knowhownonprofit.org](http://www.knowhownonprofit.org)

- Managing volunteers  
[bit.ly/18yzjmr](http://bit.ly/18yzjmr)
- Online training on creating volunteer roles  
[bit.ly/1eQdR5O](http://bit.ly/1eQdR5O)

### Institute for Volunteering Research

A world-class research and consultancy agency specialising in volunteering.

[www.ivr.org.uk](http://www.ivr.org.uk)

### Investing in Volunteers

The UK quality standard for good practice in volunteer management.

[iiv.investinginvolunteers.org.uk](http://iiv.investinginvolunteers.org.uk)

### Volunteers' Week (1–7 June)

An annual campaign supported by events throughout the UK.

[www.volunteersweek.org](http://www.volunteersweek.org)

## Other resources

### Association of Volunteer Managers

An independent body that provides support and peer-to-peer networking opportunities.

[www.volunteermanagers.org.uk](http://www.volunteermanagers.org.uk)

**Our Quick Guides give you concise, practical advice on a wide range of topics, and direct you to other sources of support. As a member, you get a new one each month.**

**Download all the Quick Guides in the members' area of the NCVO website: [bit.ly/1bShNOB](http://bit.ly/1bShNOB)**