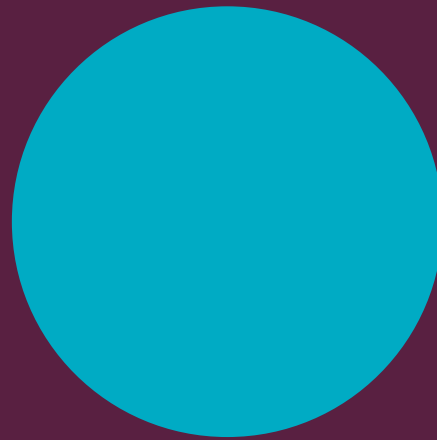


**Volunteer  
Managers**  
National  
Occupational  
Standards





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## Foreword

While the link between successful recruitment and retention of volunteers and the quality of their management is well established, volunteer management remains the most frequently overlooked building block in the infrastructure of volunteer-involving organisations. Investment, status and recognition for managers of volunteers results in volunteers reporting more satisfaction in their volunteering. The introduction of the National Occupational Standards (NOS) for the Management of Volunteers in 2003 and the development of the Excellence in Volunteer Management Programme and Investing in Volunteers quality standard, both of which link to the NOS, are all playing their part in raising the quality of volunteer management.

The redevelopment of these National Occupational Standards for the Management of Volunteers, together with a qualification framework for NVQs and SVQs, is a further significant step forward in enabling those concerned with supporting volunteers to make their full contribution to organisations and to develop their own skills and professionalism in this critical role. The standards provide a detailed description of desired work performance for managers of volunteers, including a comprehensive, easy to use matrix of the knowledge and understanding and personal qualities necessary to perform to the standard. Developed through consultation with practitioners, they reflect the highly distinctive nature of the task of managing and leading volunteers, the strong value base of

volunteering and current best practice in volunteer management.

The standards can assist in numerous ways, for example, strategic planning, budget setting, role analysis, recruitment and selection, training and support, the removal of barriers to volunteering, health and safety, monitoring, performance measurement and evaluation, self-assessment, identifying learning and development needs, and the creation of new opportunities.

Volunteer-involving organisations need to make it easier for people to volunteer, developing a wider range of opportunities for them that complements the work that paid members of staff do, while offering something special and different. Volunteering should be an opportunity for volunteers' skills to be taken into account, suitable to their lifestyle and the type of commitment they can give. Volunteers want their volunteering to be well organised, and in a way which is attentive to their particular circumstances, needs and potential, as well as to their status as volunteers rather than paid staff.

I congratulate Skills - Third Sector (formerly the UK Workforce Hub), the Management Standards Consultancy, members of the Steering Group, those who took part in the consultation and many others who contributed to the development of these standards. They have been brought up to date since the 2003 standards and they are still just as significant to our sector in improving and recognising the

complexity of the role of a volunteer manager. If new qualifications and existing qualifications are developed and maintained, as a result of these standards too, then we should see and experience even more good practice in the way we manage volunteers. Without standards of good practice, the sector would be disadvantaged. With standards of good practice, the sector will thrive.

**Justin Davis Smith**  
Chief Executive  
Volunteering England

## **Acknowledgements**

These National Occupational Standards have been developed in consultation with hundreds of individuals from across the UK who manage and co-ordinate volunteers and provide strategic direction on volunteering within their organisations. Skills - Third Sector wishes to thank all those involved for their contributions. This work could not have been completed without their assistance.

Skills - Third Sector would like to give particular thanks to the members of the Management of Volunteers Standards Steering Group and the consultants -The Management Standards Consultancy - who have worked extremely hard to ensure the validity, quality and relevance of these standards.

The UK Co-ordinating Group of the UK Education Regulatory Authorities approved these Standards in July 2008. This document contains the full and complete suite of occupational standards for the management of volunteers, the knowledge and understanding and the personal qualities required to carry out the specific units - these can be found in a matrix format at the back of the units. Other documents available upon request are the N/SVQ frameworks, the assessment strategy and the key and core skills signposting.

To access these please send an email along with your request to **[info@skills-thirdsector.org.uk](mailto:info@skills-thirdsector.org.uk)**



## Introduction

### Who are these standards for?

Many people in the UK are involved in the development and implementation of the volunteering strategy within their organisation. These NOS define the whole spectrum of activities required to achieve this effectively.

These standards are for you if you perform, manage or support any of this work, whether it is the focus of your working remit or just a small part of it. It may be a role you do as a volunteer or as part of your paid work. Whatever the circumstances, you should find these standards relevant. They have been designed primarily for those working in the voluntary and community sector (VCS) but they should also be appropriate if you work in the public sector, such as in a hospital or school.

Roles and responsibilities vary widely between organisations, as do job titles, but some typical examples of those who will find the standards useful include:

- Chief executive
- Volunteer coordinator
- Project manager
- Volunteering manager
- Director of resources
- Information and advice officer
- Volunteer leader
- HR personnel
- Voluntary services manager
- Trustee

In the standards, we have used management of volunteers and managing volunteers as generic terms encompassing the range of contributions these individuals make to the successful involvement of volunteers in their organisations.

- A. Develop and evaluate strategies and policies that support volunteering
- B. Promote volunteering
- C. Recruit place and induct volunteers
- D. Manage and develop volunteers
- E. Manage yourself, your relationships and your responsibilities
- F. Provide management support for volunteering programmes

## Why should you use them?

The National Occupational Standards for the Management of Volunteers specify the standards of performance to which people recruiting and supporting volunteers should be working.

They also describe the knowledge and skills managers of volunteers need to perform to the required standard. Managers of volunteers can use them to check that they are doing a good job, to identify any knowledge they need to acquire or skills they need to develop. Organisations can use the standards to ensure that those involved in the management of their volunteers are competent and have the knowledge and skills to do so effectively and safely.

### **Benefits to individuals:**

- Clear description of the standards they need to meet
- An awareness of the knowledge and understanding required to meet each standard
- An awareness of the personal qualities required to meet each standard
- Tool to help plan current career development
- Qualification structure to support career development
- Heightened awareness of job role and responsibilities
- Chance to obtain objective appraisal and feedback if working with a manager for example
- Better understanding of how to transfer their skills from one situation to another
- Sense of achievement from a job well done
- Greater confidence to do their job well

### **Benefits to organisations include:**

- Common standard for everyone in the sector
- Tool to help design and evaluate policies, programmes and procedures
- Set of fair and objective criteria for recruiting and appraising staff and volunteers
- Method of identifying training needs for both the organisation and individuals
- Comprehensive system for managing and developing staff and volunteers
- Qualifications structure to support learning, development and competence

## How can you use them?

Individuals, organisations and training providers can use standards in a number of ways to improve performance.

Here are just some ideas:

### **Recruitment and selection:**

- Design and implement fair and ethical recruitment and selection procedures
- Prepare recruitment specifications and job advertisements
- Design interview checklists and questions and information sheets for referees

### **Job design and evaluation:**

- Design and monitor job roles and responsibilities
- Develop and update job descriptions and person specifications
- Design criteria for evaluating job roles and grading staff

### **Manage individual and team performance:**

- Plan work and monitor delivery
- Specify what level of performance must be achieved
- Appraise staff, provide constructive feedback and identify any areas for support
- Diagnose why individual performance may not be meeting expectations
- Improve customer service and relationships
- Contribute evidence for organisational quality systems
- Provide specifications for contract tendering and monitoring those contracts

### **Identify training needs:**

- Specify the skills and competence needs of an organisation
- Identify and prioritise individual or group learning needs and plan to meet them
- Identifying previously-acquired skills, knowledge and competence
- Develop a strategic view of future learning requirements

### **Structure learning programmes:**

- Link training to organisational objectives and economic need
- Increase the relevance and credibility of training programmes
- Enable new learners to see the complete picture and the relevance of training
- Broaden the base of skills needs that are recognised and met by the organisation
- Identify learning opportunities at work

### **Evaluate the delivery of training:**

- Provide a format and clear goals for structured learning at work
- Design tailored training packages and assess relevance of predefined courses
- Define the learning outcomes and progression routes for learners
- Support the design of evaluation tools
- Evaluate the effectiveness of training

## What's in a standard?

A suite of standards is made up of units. This suite for the management of volunteers comprises 37 units, each constructed in the same way. This section describes these building blocks.

### **A standard**

Each standard describes the functions or activities which make up the role of someone involved in managing volunteers.

Here is one example:

### **The standard of competence**

C5 Induct volunteers

#### **Overview**

A brief description of what the standard means by Induct volunteers

#### **Performance Standards**

These are the criteria against which competence in a task is assessed. They explain what must be done to demonstrate that the standard has been met.

They help individuals perform a job by setting out what needs to be done to do it well. They also help managers or assessors to assess individual's competence.

#### **Knowledge & Understanding**

This covers the knowledge and understanding required in this case to induct volunteers.

Or the knowledge and understanding the person being recruited into the role will need to know and understand when they come to induct volunteers.

### **Personal Qualities**

This describes the personal qualities a person might need to have when they induct volunteers.

There is also a matrix chart that illustrates what units can help you work towards an investing in volunteers award. [See page 110.](#)

## Training and qualifications based on the standards

One of the uses of National Occupational Standards is to provide a nationally recognised framework for training and qualifications. They can be used to inform, structure and develop unaccredited and accredited training, including those provided by professional bodies and Higher Education Institutions. We encourage providers of training and qualifications for the management of volunteers to benchmark their courses to the standards and to tell us so that we can post the information on our website.

Qualification frameworks for National Vocational Qualifications (NVQs) and their equivalent in Scotland, Scottish Vocational Qualifications (SVQs), have been developed at three levels for managers of volunteers. Level 3 is for those who directly manage volunteers on a day-to-day basis. Level 4 is targeted at those with overall responsibility for recruiting, managing and developing volunteers in their organisation or their part of the organisation. Level 5 focuses on developing and implementing the strategy for involving volunteers in their organisation's work.

If you wish to access these documents please contact Skills - Third Sector [info@skills-thirdsector.org.uk](mailto:info@skills-thirdsector.org.uk)

We will work to encourage Awarding Bodies to develop and deliver these qualifications. We will also investigate demand for smaller qualifications to meet the needs of workers for whom the management of volunteers is not a core role. We will, of course, take account of existing qualifications in the market.

Up-to-date information on the development and delivery of qualifications based on the National Occupational Standards for Volunteer Managers standards can be found on our website [www.skills-thirdsector.org.uk](http://www.skills-thirdsector.org.uk)

## Investing in Volunteers

### An award for volunteer-involving organisations

In the same way that Investors in People provides a framework of indicators to enable organisations to scrutinise their systems for managing and developing their people, particularly their paid staff, Investing in Volunteers looks at how volunteer-involving organisations can guarantee a quality experience for volunteers. Achieving it demands an organisation values and support its volunteers and their contributions, rather than relying on a few dedicated people alone. Those organisations that meet the standard can undergo external assessment and achieve the award as well as a license to use the quality mark in their publicity and on their stationery.

The two systems – the National Occupational Standards for Managing Volunteers and Investing in Volunteers – are complementary, enabling organisations and individuals to review and develop their best practice. Covering similar areas, the collection of evidence for one standard will assist the collection of evidence for the other. For example, if you develop or improve your organisation's volunteering policy the organisation will have started to achieve Indicator 1 of Investing in Volunteers and the individuals involved in developing it will have worked towards some of the units of Key Area A of the National Occupational Standards.

Organisations that achieve the Investing in Volunteers award and support individuals to work to the National Occupational Standards will be attractive to current and future volunteers, staff and funders. Individuals who work to National Occupational Standards and achieve any qualifications based on them will be progressing personally and professionally and enhancing the attractiveness of the organisation to funders and volunteers.

## What is the role of Skills - Third Sector?

You can find out more about the forthcoming Investing in Volunteers Award from the Volunteer Development Agency in your country (see Section 7 'Useful Contacts and Resources').

On [page 110](#) we have developed a matrix that enables you to see which NOS correlate with which liV indicator.

Skills - Third Sector (formerly the UK Workforce Hub) is the Standards Setting Body for the voluntary and community sector (VCS). This means that as a professional body the government licenses it to develop National Occupational Standards for the sector and its specific occupations. Skills - Third Sector is also a registered charity so provides wider resources, research and campaigns to support third sector organisations to recognise the importance of skills in their workforce and to develop the skills of their staff, trustees and volunteers.

The process of developing the Standards involves engaging relevant employees from the voluntary and community sector, this is to make sure that the appropriate skills to carry out the occupation in question are included within a suite of standards. Skills - Third Sector has also developed standards for Trustees and Management Committee Members, Volunteer Managers, Campaigners and Development Workers (those who are based in support agencies and provide advice to front line organisations).

Skills - Third Sector works strategically to encourage and enhance learning which supports the development and work of paid staff, volunteers, management committee members and trustees in voluntary and community organisations. It does this by undertaking research into skills needs; through working strategically with government, funders, sector skills councils, employers and learning providers; and by supporting effective practice through developing and promoting learning frameworks, standards and resources.

## Tell us what you think

Many hours have gone into developing these National Occupational Standards. However, we need to maintain their relevance and keep them up-to-date with emerging policies and practice in the fundraising world.

Skills - Third Sector would welcome hearing from you if you can identify gaps in the standards or ways in which they could be improved or made more user-friendly.

We would also like to hear about your positive experiences in using them.

To get in touch with us or to keep up-to-date with developments, we can be reached at:

### Skills - Third Sector

The Circle  
33 Rockingham Lane  
Sheffield S1 4FW

[www.skills-thirdsector.org.uk](http://www.skills-thirdsector.org.uk)  
[info@skills-thirdsector.org.uk](mailto:info@skills-thirdsector.org.uk)  
0845 450 3860

Charity no 1132476

## Getting started: identifying the relevant standards

There is great diversity in the roles and responsibilities performed by individuals involved in the management of volunteers.

Work is undertaken at strategic, operational and tactical levels. The mix of functions carried out depends upon the nature, size and structure of the organisation and an individual's level of responsibility and authority within it.

The National Occupational Standards cover the entire spectrum of activities involved in managing volunteers effectively.

**It is unlikely that one individual will carry out all of the functions described by the standards, so, to use them effectively, you need to identify the units relevant to the work you do, want to do or manage.**

The chart on the next page should help you to build up your role profile. To establish a complete picture of the work you do, you can combine the relevant units from this suite of standards with that of other suites (e.g. management and leadership, marketing, health and social care, housing etc). Other standard can be found on the main online directory at **[www.ukstandards.org.uk](http://www.ukstandards.org.uk)**

## Create a role profile

This quick check list will help you discover which units from the standards are most relevant to you. Which, of these activities do you do, manage or want to do?

### Key Area A

*Develop and evaluate strategies and policies that support volunteering*

- Unit Title (Ref)
- Contribute to the development of strategy in an organisation that involves volunteers (A1)
- Develop a volunteering policy (A2)
- Develop structures, systems and procedures to support volunteering (A3)
- Develop plans to meet strategic goals in an organisation that involves volunteers (A4)
- Evaluate volunteers' contribution to strategic goals (A5)

### Key Area B

*Promote volunteering*

- Unit Title (Ref)
- Promote volunteering within your organisation (B1)
- Promote volunteering to potential and actual volunteers (B2)

### Key Area C

*Recruit and induct volunteers*

- Unit Title (Ref)
- Manage the recruitment and placement of volunteers (C1)
- Advertise for volunteers (C2)
- Recruit and place volunteers (C3)
- Manage the induction of volunteers (C4)
- Induct volunteers (C5)

### Key Area D

*Manage and develop volunteers*

- Unit Title (Ref)
- Plan, organise and monitor volunteering activities (D1)
- Lead and motivate volunteers (D2)
- Support the development of volunteers' knowledge, skills and competence (D3)
- Provide one-to-one support to help volunteers develop (D4)
- Enable volunteers to learn in groups (D5)
- Maintain records of volunteers (D6)
- Manage volunteers' expenses (D7)
- Help address problems affecting volunteers (D8)

### Key Area E

*Manage yourself, your relationships and your responsibilities*

- Unit Title (Ref)
- Manage and continuously develop your resources for managing volunteers (E1)
- Manage and continuously develop your own and others' capacity for managing volunteers (E2)
- Develop productive working relationships with volunteers and other stakeholders (E3)
- Promote productive working relationships between volunteers and other stakeholders (E4)
- Develop and maintain partnership working to support your volunteering strategy (E5)
- Identify, assess and control health and safety risks (E6)

**Key Area F**

*Provide management support for volunteering programmes*

- Unit Title (Ref)
- Promote your organisation and its services to stakeholders (F1)
- Manage projects involving volunteers (F2)
- Obtain funds for your organisation's volunteering policies and plans (F3)
- Manage an expenditure budget for volunteering activities (F4)
- Procure supplies for volunteering activities (F5)
- Manage physical resources for volunteering activities (F6)
- Organise events involving volunteers (F7)
- Manage the quality of services involving volunteers (F8)
- Lead and participate in meetings involving volunteers (F9)
- Manage information for volunteering activities (F10)
- Report to external agencies about volunteering activities (F11)

To find out more about other standards that may form part of your occupation other than these ones please visit the UK standards directory at **[www.ukstandards.org.uk](http://www.ukstandards.org.uk)**



## National Occupational Standards Introduction

Each colour represents the colours of the key purposes and can be cross referenced with the knowledge and understanding and personal qualities matrices at Section 3. To learn more about what we mean by the knowledge and understanding and personal qualities aspect of a standard please read page 8 of the introduction.

## The Management of volunteer National Occupational Standards

### Key Area A

#### **Develop and evaluate strategies and policies that support volunteering**

- (A1) Contribute to the development of strategy in an organisation that involves volunteers
- (A2) Develop a volunteering policy
- (A3) Develop structures, systems and procedures to support volunteering
- (A4) Develop plans to meet strategic goals in an organisation that involves volunteers
- (A5) Evaluate volunteers' contribution to strategic goals

### Key Area B

#### **Promote Volunteering**

- (B1) Promote volunteering within your organisation
- (B2) Promote volunteering to potential and actual volunteers

### Key Area C

#### **Recruit and induct volunteers**

- (C1) Manage the recruitment and placement of volunteers
- (C2) Advertise for volunteers
- (C3) Recruit and place volunteers
- (C4) Manage the induction of volunteers
- (C5) Induct volunteers

## **Key Area D**

### **Manage and develop volunteers**

- (D1) Plan, organise and monitor volunteering activities
- (D2) Lead and motivate volunteers
- (D3) Support the development of volunteers' knowledge, skills and competence
- (D4) Provide one-to-one support to help volunteers develop
- (D5) Enable volunteers to learn in groups
- (D6) Maintain records of volunteers
- (D7) Manage volunteers' expenses
- (D8) Help address problems affecting volunteers



## Contribute to the development of strategy in an organisation that involves volunteers

### Overview

This unit is about contributing to the development of strategy in an organisation that involves volunteers.

It covers helping to identify the organisation's stakeholders, their needs, preferences and other factors in order to make informed suggestions for improvements to the organisation's strategy.

## Key Area A

### Develop and evaluate strategies and policies that support volunteering

### Performance Standards

#### Contribute to the development of your organisation's strategy

1. identify your organisation's stakeholders, including actual and potential beneficiaries, volunteers and staff
2. research stakeholders' needs and preferences that can potentially be met by your organisation
3. research the impact of key political, economic, social, technological and legal factors on your organisation's strategic objectives
4. consult on your research findings with stakeholders using methods designed to stimulate a broad range of responses
5. help stakeholders provide informed feedback, taking account of their diverse needs, abilities and preferences
6. suggest improvements to your organisation's strategic objectives in ways that will influence decision-makers
7. provide a rationale for your suggestions based on the evidence you have collected
8. record all information in ways that will help future planning and activities

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Develop a volunteering policy

### Overview

This unit is about developing your organisation's volunteering policy.

It involves identifying how volunteers can contribute to strategic goals, assessing and managing the risks in involving volunteers, developing policy for integrating volunteers, and gaining understanding and support for your volunteering policy.

### Performance Standards

#### Identify how volunteers can contribute to strategic goals

1. review and confirm your understanding of the organisation's culture, values and goals
2. identify and evaluate the unique contributions that volunteers can make to the organisation's effectiveness, efficiency and public profile
3. identify reasons for involving volunteers that are consistent with the organisation's culture, values and goals
4. clearly define the activities undertaken by volunteers and those undertaken by paid staff
5. identify and develop the range of potential benefits to volunteers
6. audit volunteers' skills, aspirations and motivations and match these to the organisation's goals and available opportunities
7. share your ideas on the contributions that volunteers could make with the volunteers themselves and take account of their feedback



### Assess and manage the risks in involving volunteers

8. keep yourself up-to-date on the organisation's risk management policy and good practice in risk management in your sector
9. identify the risks that may arise from involving volunteers
10. assess the severity of these risks by considering the impact they would have and the likelihood of them occurring
11. put in place measures to ensure that all risks are reduced to acceptable levels
12. ensure that appropriate insurance is in place to cover volunteering activities
13. ensure that all those involved in recruiting and managing volunteers are competent to assess and manage the risks relating to specific individuals, activities and volunteering roles
14. promote a positive risk management culture throughout all activities that involve volunteers
15. monitor the effectiveness of risk management and put in place additional measures to mitigate risks, where necessary

### Develop policy for involving volunteers

16. collect and analyse information relevant to developing a volunteering policy
17. identify and evaluate requirements, constraints and best practice for volunteering policy
18. examine all areas of the organisation in which volunteering plays a role or may play a role in the future
19. identify the implications of volunteers' involvement in these areas
20. ensure the policy emphasises the value of volunteers' contributions
21. ensure the policy reduces to an acceptable level any risks that may arise from involving volunteers
22. record your policy in a way that is clear and understandable to stakeholders

23. develop a clear strategy for the implementation of your policy

### Gain understanding and support for your volunteering policy

24. present your policy to stakeholders and decision-makers in a way that meets their needs, abilities and preferences
25. explain your policy honestly and in a way that gains the commitment and motivation of volunteers, other stakeholders and decision-makers
26. give volunteers, other stakeholders and decision-makers the support they need to provide feedback on your policy
27. deal with queries and objections in an open and transparent way
28. collect, analyse and report feedback in a way that shows volunteers, other stakeholders and decision-makers that you have taken account of their views
29. refine your policy in line with the feedback you receive
30. win agreement and approval for your final policy
31. record your final policy in a way that will help you and your team implement and evaluate it in the future

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Develop structures, systems and procedures to support volunteering

### Overview

This unit is about developing structures, systems and procedures to support volunteering.

This involves identifying, evaluating, designing and implementing structures, systems and procedures and consulting on these with volunteers, other stakeholders (such as beneficiaries of volunteer work, individual or corporate funders, partner organisations and paid staff) and decision-makers (such as trustees, committee members and senior managers).

### Performance Standards

#### Identify and evaluate structures, systems and procedures to support volunteering

1. identify existing structures, systems and procedures that are relevant to volunteers
2. identify the diverse needs and preferences of volunteers and potential volunteers in relation to structures, systems and procedures
3. encourage and support volunteers and colleagues to provide feedback on the effectiveness and efficiency of structures, systems and procedures and how well they meet diverse needs and preferences
4. identify and evaluate structures, systems and procedures used in other relevant contexts to identify best practice
5. analyse the information and identify ways in which structures, systems and procedures could best meet the needs and preferences of your volunteers
6. share your findings with decision-makers and stakeholders and take account of their feedback



A3



### **Design structures, systems and procedures to support volunteering**

7. identify the current and potential resources available for structures, systems and procedures
8. develop specifications for structures, systems and procedures using evaluation and feedback
9. develop options to meet these specifications which are achievable within available resources and are compatible with other relevant structures, systems and procedures
10. make sure the options you develop promote the diversity of volunteers
11. present your options to decision-makers and stakeholders and help them to provide informed feedback on your options
12. take account of the feedback of decision-makers and stakeholders in selecting and refining an option and gain their approval to move forward

### **Implement organisational structures and systems to support volunteering**

13. involve volunteers and colleagues in planning how to implement structures, systems and procedures
14. promote the benefits of structures, systems and procedures that support volunteering to colleagues, decision-makers and other stakeholders
15. negotiate and agree your plans for implementing structures, systems and procedures with decision-makers and stakeholders
16. make sure those involved in implementing the structures, systems and procedures understand the implications for their work
17. identify and provide the training, development and other support that may be required to make the structures, systems and procedures effective

18. monitor the implementation of the structures, systems and procedures, ensuring they are being adhered to
19. carry out scheduled evaluations and make any necessary improvements

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Develop plans to meet strategic goals in an organisation that involves volunteers

### Overview

This unit is about developing plans to meet strategic goals in an organisation that involves volunteers.

It involves drafting plans, identifying the resources needed to carry out your plans and gaining understanding and support for your plans from volunteers and other key stakeholders, such as beneficiaries, paid staff and partner organisations.

### Performance Standards

#### Plan to meet strategic goals

1. identify and agree the strategic goals that are relevant to you and your team
2. confirm your understanding of these strategic goals with decision-makers, and evaluate the implications for you and your team
3. develop specific, measurable, achievable, realistic and time-bound objectives that will help you and your team achieve the strategic goals
4. select and agree methods and tasks to achieve your objectives
5. identify and assess the risks associated with each objective, method and task
6. put in place measures to reduce all risks to acceptable levels and develop plans to deal with contingencies if they occur
7. identify how and when you will monitor, evaluate and revise your plans
8. record your plans in a way that will help you and your team to implement them in the future

#### Identify the resources needed to carry out your plans

9. assess the type, quantity, availability and cost of the resources you need for each task
10. select resources which can be used in ways that are efficient, effective and in line with your organisation's policies and values and the needs and preferences of your volunteers and stakeholders
11. make sure the chosen resources are within your allocated budget, or provide a persuasive case for more financial support
12. assess any training implications of using your chosen resources, and develop plans to address these
13. record information and plans about the chosen resources in a way that will help you and your team to use them in the future



### **Gain understanding and support for your plans**

14. present your plans to volunteers, other stakeholders and decision-makers in ways that meet their diverse needs and preferences
15. explain your plans and promote their benefits in ways that are likely to gain the commitment and motivation of stakeholders and decision-makers
16. give volunteers, other stakeholders and decision-makers the support they need to provide feedback on your plans
17. deal with queries and objections in a positive, open and transparent way
18. collect, analyse and report feedback in a way that shows your volunteers, other stakeholders and decision-makers that you have taken account of their views
19. refine your plans in line with the feedback you receive
20. record your final plans in a way that will help you and your team to implement and evaluate them in the future

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Evaluate volunteers' contribution to strategic goals

### Overview

This unit is about evaluating volunteers' contribution to strategic goals.

It involves: evaluating your organisation's effectiveness in involving volunteers; assessing the contribution of volunteers to strategic goals; and communicating volunteers' contribution to both volunteers and other stakeholders (for example, the beneficiaries of the volunteers' work, partner organisations, individual and corporate funders, paid staff and decision-makers).

### Performance Standards

#### Evaluate your organisation's effectiveness in involving volunteers

1. identify the number of volunteers recruited, retained and involved by your organisation and compare this with any targets set
2. identify the reasons why volunteers want to, and continue to want to be involved with your organisation
3. evaluate the diversity of volunteers and how well this reflects the make-up of the community your organisation is operating in
4. identify the reasons why volunteers decide not to become involved with your organisation or decide to end their volunteering commitment to your organisation
5. analyse the reasons for volunteers' involvement or non-involvement and their implications for your organisation
6. make recommendations for any changes to your organisation's volunteering policy, structures, systems and procedures to improve your organisation's effectiveness in involving volunteers



### **Assess the contribution of volunteers to strategic goals**

7. identify and agree which strategic goals and volunteer contributions you need to assess
8. identify and agree the criteria you will use to assess volunteer contributions
9. identify the information you need and the most effective methods of collecting this information
10. collect relevant information and verify that it is accurate and up-to-date
11. analyse information to assess the value of volunteers' contributions to strategic goals and the impact of volunteering on your volunteers
12. check with volunteers, colleagues, other stakeholders and decision-makers to ensure that your assessment is realistic
13. record your assessment of volunteer contributions and the evidence that supports it

### **Communicate volunteers' contribution to stakeholders and volunteers**

14. identify the stakeholders and volunteers with whom you want to communicate and the information they need to receive
15. identify the most effective methods and styles of communicating with your volunteers and stakeholders, taking into account their diverse needs, abilities and preferences
16. compile and present your analysis and evidence in a way that meets the needs, abilities and preferences of your volunteers and stakeholders
17. emphasise the value of volunteering to the organisation
18. respond constructively to requests for clarification and further information
19. evaluate the effectiveness of assessing and communicating volunteer contributions and record your evaluation for future reference

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Promote volunteering within your organisation

### Overview

This unit is about promoting volunteering within your organisation.

This involves: helping internal stakeholders (such as trustees and committee members, managers and employee representatives) understand the role of volunteers and the contribution they can make to achieving strategic goals; helping people in your organisation support volunteers; and identifying and reducing barriers to volunteering within your organisation.

## Key Area B Promote volunteering

### Performance Standards

#### Promote volunteering to key people in your organisation

1. identify the role of volunteers within your organisation's strategies and plans
2. communicate with internal stakeholders on the role of volunteers and the contribution they can make to the organisation's goals in ways that gain their understanding and active support
3. identify, quantify and communicate the contribution that volunteers make to your organisation's goals

#### Help people in your organisation support volunteers

4. help people in your organisation
  - understand their attitudes to volunteers and the reasons for these attitudes
  - identify how volunteers can make contributions to your organisation's goals
  - adopt attitudes that support volunteers in making contributions to your organisation's goals
5. communicate to people in your organisation
  - the roles and responsibilities of volunteers
  - their roles and responsibilities in supporting volunteers
6. provide opportunities for people in your organisation to develop the competences they need to support volunteers
7. encourage behaviour that helps volunteers make effective contributions
8. discourage behaviour that hinders volunteers from making effective contributions



B1



### **Identify and reduce barriers to volunteering in your organisation**

9. monitor the impact of structures, systems, policies and procedures on volunteering
10. monitor the diversity of volunteers and how well this reflects the make-up of the community your organisation is operating in
11. monitor the level of support volunteers receive from people in your organisation
12. analyse monitoring information to identify and prioritise any barriers that may prevent volunteers from making their full contribution
13. work with relevant people to identify and recommend improvements to structures, systems, policies and procedures or the support volunteers receive to ensure volunteers are able to make appropriate contributions

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Promote volunteering to potential and actual volunteers

### Overview

This unit is about promoting volunteering to potential and actual volunteers.

This involves encouraging new people to volunteer, involving volunteers in your organisation and, where necessary, helping them to change or conclude their role and contribution.

### Performance Standards

#### Promote volunteering to potential volunteers

1. involve relevant people and use creative methods to identify
  - the types of people who may wish to volunteer
  - ways of accessing potential volunteers with diverse abilities, styles and motivations
  - the key motivations people may have for wishing to volunteer
2. use cost-and time-effective communication methods to access groups of potential volunteers
3. help potential volunteers to understand
  - the importance of volunteering in meeting the organisation's vision, mission and goals
  - how people with diverse abilities, styles and motivations can make valuable contributions as volunteers
  - the volunteering opportunities available and what is involved
  - the commitment they need to make as volunteers
  - the potential benefits of volunteering and how volunteering can meet their needs and expectations
4. help service users who are considering volunteering understand how becoming a volunteer will change their relationship with the organisation
5. help paid employees in your organisation who are considering changing their status to that of volunteer understand how this will change their relationship with the organisation
6. provide factual evidence to illustrate how volunteers have contributed in the past and how they have benefited personally from doing so
7. help people to investigate volunteering opportunities further and make a commitment to becoming a volunteer
8. refer people to other volunteer-involving organisations, if your organisation is unable to offer suitable volunteering opportunities



### Involve volunteers in your organisation

9. help volunteers understand their motivations and how volunteering can meet their evolving needs and expectations
10. help volunteers find placements that
  - meet their evolving needs and expectations
  - allow them to contribute their experience, knowledge, skills and competence to achieving your organisation's vision, mission and goals
11. provide support and supervision to allow volunteers to fulfil their roles and carry out their tasks effectively, safely and securely
12. provide opportunities for volunteers to reflect on and understand their experience of volunteering
13. provide regular, accurate and balanced feedback to volunteers on their individual and collective contributions and the value they bring to your organisation
14. encourage volunteers to extend their volunteer roles within the limits of their knowledge, skills and competence
15. provide opportunities for volunteers to be involved in your organisation's wider activities

### Help volunteers change or conclude their role and contribution

16. ensure volunteers understand what they need to do if they wish to change their role and contribution to your organisation
17. invite volunteers to discuss their motivations and their contribution to the organisation, whenever there are indications that their current role no longer meets their or your organisation's needs
18. wherever possible, find alternative placements for volunteers whose current role no longer meets their or your organisation's needs
19. help volunteers who are considering taking up paid positions in your

- organisation understand how becoming an employee will change their relationship with the organisation
20. invite volunteers who are concluding their volunteering agreement to provide feedback on their experience of volunteering
21. recognise the contribution volunteers have made to your organisation's vision, mission and goals
22. agree the nature of the relationship volunteers wish to have with your organisation after their agreement is concluded, including how they can volunteer in the future
23. ensure volunteers return all your organisation's property on conclusion of their agreement
24. inform relevant people in your organisation about the reasons why volunteers conclude their agreements and how the experience of volunteering with your organisation could be improved
25. record information accurately in line with your organisation's policies and legal requirements

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Promote volunteering to potential and actual volunteers

### Overview

This unit is about managing the recruitment and placement of volunteers.

This involves: specifying volunteers' roles and the knowledge, skills and experience required; overseeing the recruitment and placement of volunteers; and agreeing mutual expectations with volunteers.

## Key Area C Recruit and induct volunteers

### Performance Standards

#### Define volunteer roles and the knowledge, skills and experience required

1. involve people with relevant knowledge and expertise in defining volunteer roles
2. identify the contributions that volunteers can make to your organisation's goals
3. identify roles that are suitable for volunteers with a diverse range of abilities, styles and motivations
4. identify the potential benefits of roles to volunteers
5. ensure that risk assessments are carried out for volunteer roles
6. ensure that roles for volunteers do not undermine or substitute the work of any paid staff, and vice versa
7. prepare role descriptions for proposed volunteer roles that clearly
  - identify the role's purpose, responsibilities and working relationships
  - define the limits of the volunteer's role
8. prepare volunteer specifications for proposed volunteer roles that clearly
  - identify the knowledge, skills, experience, personal qualities and availability required
  - specify any factors which would exclude certain people from being considered for the role
  - state any references or official checks that will be carried out on applicants for the role
9. ensure that role descriptions and volunteer specifications
  - are sufficiently broad and flexible to include volunteers with diverse needs, abilities and preferences
  - comply with relevant legislation and organisational policies
10. use the role descriptions and volunteer specifications to establish fair and clear criteria against which the suitability of potential volunteers can be assessed



### Oversee the recruitment and placement of volunteers

11. ensure that processes are used to attract volunteers from a wide range of backgrounds and abilities
12. ensure that potential volunteers are made aware of
  - the volunteer roles you are recruiting for and the activities involved
  - how the volunteer roles contribute to strategic goals
  - the potential benefits of the volunteer roles to themselves
  - the knowledge, skills, experience, personal qualities and availability required
  - the application and selection process
  - any mandatory training requirements
  - any factors which would exclude them from being considered for certain volunteer roles
  - any references or official checks that will be carried out on applicants for the role
  - the commitment they would need to make
13. ensure that assessment and selection methods are standardised for each different role and that established, fair and clear criteria are used to assess the suitability of volunteers
14. ensure that references and official checks are carried out wherever required
15. ensure that volunteers are placed in suitable volunteering roles
16. ensure that relevant feedback is given to applicants who are not suitable for the volunteer roles available

### Agree mutual expectations with volunteers

17. draw up volunteering agreements that reflect the level of risk involved in the volunteer role and the level of commitment being made by the volunteer
18. ensure volunteering agreements include information on
  - the volunteer role, the activities involved and the boundaries of the role
  - the standards of performance and behaviour expected of volunteers
  - the training, support and supervision the volunteer can expect from your organisation
  - the risk assessment for the role and the terms of any insurance cover
  - the expenses that will be reimbursed by your organisation
  - any organisational policies that are relevant to the volunteer role
19. ensure volunteers understand the importance of the volunteering agreement and that it is binding in honour only
20. record information accurately and process it in line with legal requirements and organisational policy

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Advertise for volunteers

### Overview

This unit is about advertising for volunteers.

This involves identifying the appropriate advertising media and drawing up and placing advertisements to recruit volunteers.

### Performance Standards

#### Select advertising media to recruit volunteers

1. identify advertising media that are appropriate for reaching diverse groups of potential volunteers
2. identify the budget available for recruiting volunteers and select the most appropriate advertising media in order to reach potential volunteers cost-effectively within the budget
3. select advertising media that comply with relevant legislation and your organisation's policies
4. get help from competent specialists to identify and select appropriate advertising media, where necessary
5. monitor and evaluate the responses from different advertising media and use this information to improve your selection of media in the future

#### Draw up and place advertisements to recruit volunteers

6. draw up clear, concise and accurate advertisements, using language and images that are likely to appeal to, and be understood by, diverse groups of potential volunteers
7. include in advertisements all relevant information, such as
  - your organisation's goals and the importance of volunteering in achieving them
  - the volunteering opportunities available
  - the roles and activities involved
  - the knowledge, skills, experience and personal qualities required
  - the geographical location(s) of the volunteering opportunities
  - the time commitment expected of the volunteers
  - the potential benefits of the volunteering opportunities for volunteers
  - what people have to do to apply to become a volunteer
  - what people have to do if they want further information



8. check that advertisements comply with relevant legislation and your organisation's policies
9. place advertisements in the sections of advertising media that are most likely to reach the volunteers you are aiming to attract
10. get help from competent specialists to draft and place advertisements, where necessary
11. ensure systems are in place to deal with responses and any queries from advertisements and to help respondents decide whether to volunteer
12. monitor and evaluate the responses to different types of advertisements and use this information to improve your drafting of advertisements in the future

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Recruit and place volunteers

### Overview

This unit is about the recruitment and placement of volunteers. It involves assessing with volunteers their suitability for volunteer roles and placing volunteers in suitable roles

### Performance Standards

#### Assess with volunteers their suitability for volunteer roles

1. help potential volunteers to understand clearly
  - the range of volunteer roles you are recruiting for and the activities involved
  - how the volunteer roles contribute to organisational goals
  - the potential benefits of the volunteer roles to themselves
  - the knowledge, skills, experience, personal qualities and availability required
  - the selection process and criteria
  - any compulsory training requirements
  - any factors which would exclude them from being considered for certain volunteer roles
  - any references or official checks that will be carried out on applicants for the role
  - the commitment they would need to make
2. help potential volunteers to articulate their motivations for volunteering and understand how volunteer roles could meet their needs and expectations
3. provide sufficient information to potential volunteers to allow them to assess their suitability for specific volunteer roles, whether the roles will meet their needs and expectations and what support and supervision they may require
4. assess potential volunteers' experience and the extent to which they possess the knowledge, skills and personal qualities required for the role
5. use standardised assessment and selection methods that enable you to identify suitable volunteers for a particular role based on established criteria
6. only where required for the role
  - take up references to validate your assessment of potential volunteers' knowledge, skills and personal qualities



- check potential volunteers' qualifications
  - carry out official criminal records checks on potential volunteers
7. decide whether potential volunteers are suitable for volunteer roles based on a fair and accurate assessment of sufficient evidence, and inform them promptly of your decision
  8. provide relevant feedback to applicants who are unsuitable for specific volunteer roles

**Place volunteers in suitable roles**

9. involve relevant people appropriately in matching volunteers to suitable volunteer placements
10. provide fair and equal access to volunteering opportunities to all volunteers with the appropriate knowledge, skills, experience, personal qualities and availability
11. place volunteers in roles which provide a good fit with their knowledge, skills, experience, personal qualities and availability and which meet their needs and expectations
12. refer volunteers to alternative volunteering opportunities if those immediately available are not suitable

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Manage the induction of volunteers

### Overview

This unit is about managing the induction of volunteers.

It involves identifying volunteers' induction requirements and planning to meet them, preparing information and guidance materials and organising induction activities for volunteers.

### Performance Standards

#### Identify volunteers' induction requirements and plan to meet them

1. identify the general information about your organisation and its policies, and details about particular volunteer roles, that volunteers need to be confident in their roles
2. identify any specific knowledge, skills and competences that individual volunteers need to develop in order to fulfil particular volunteer roles
3. take account of volunteers' diverse abilities, styles and motivations, their experience, knowledge, skills and competence
4. involve relevant people in developing induction plans and, where they have a role in delivering the plan, check they are competent and committed to fulfilling their role
5. prepare induction plans that meet volunteers' identified induction requirements and state who is involved in meeting those requirements
6. record information accurately and treat all information confidentially
7. comply with legal requirements and your organisation's policies

#### Prepare information and guidance materials for volunteers

8. identify the information and guidance volunteers require in order to take on volunteer roles
9. prepare information and guidance materials that
  - contain accurate, up-to-date information that meets volunteers' requirements
  - present information in a clear and concise way that volunteers can understand quickly
  - take into account the needs of volunteers with diverse abilities, styles and motivations
  - reinforce the importance of volunteers in meeting the organisation's goals



- summarise relevant organisational policies and how they apply to volunteers
  - clarify the limits of volunteering roles, specifying anything they are not allowed to do
  - make cost-effective use of resources
10. involve relevant people in the development of information and guidance materials and gain their approval of the materials prior to publication
  11. ensure that information and guidance materials are available when volunteers need them
  12. review materials in response to changes in information/guidance to be provided or feedback from users

#### **Organise induction activities for volunteers**

13. co-ordinate the contributions of those involved in inducting volunteers
14. provide sufficient training, supervision and support to ensure volunteers are able to fulfil their duties and carry out their tasks safely and effectively, including any mandatory training required
15. provide sufficient briefing to ensure volunteers understand, and are prepared to work within, the limits of their roles
16. provide additional support or refer volunteers to alternative volunteering opportunities if they are unable to fulfil their duties and carry out their tasks safely and effectively
17. obtain feedback from volunteers and other relevant people on the induction process and use this information to improve the process in the future

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Induct volunteers

### Overview

This unit is about inducting volunteers.

It involves helping volunteers to understand how they can contribute to your organisation's goals and helping them to fulfil their duties safely and effectively.

### Performance Standards

#### Help volunteers understand how they can contribute to your organisation's goals

1. use appropriate means, taking into account volunteers' abilities, styles and motivations, to help them understand
  - the goals of your organisation and how it plans to meet these goals
  - where they fit within the structure of the organisation
  - your organisation's volunteering policy and the value it places on the contributions of volunteers
  - other organisational policies and how they apply to them
  - what is expected of them in their particular roles
  - what they can expect from your organisation in terms of support, training, supervision and involvement in the wider activities of your organisation
  - who to approach for help, support or advice and how to do so
  - other people they will relate to
2. help volunteers articulate the specific contributions they intend to make to your organisation's goals

#### Help volunteers to fulfil their duties safely and effectively

3. instruct volunteers in their duties and demonstrate to them how to carry out their tasks in ways appropriate to their abilities, styles and motivations
4. check that volunteers understand their duties and how to carry out their tasks
5. clarify the limits of volunteers' roles, specifying anything they are not allowed to do
6. check that volunteers understand, and are prepared to work within, the limits of their roles
7. ensure volunteers understand the risk assessment for their roles



C5



8. provide sufficient supervision and support to ensure volunteers are able to fulfil their duties and carry out their tasks safely and effectively
9. provide additional support or refer to relevant people, if volunteers are unable to fulfil their duties and carry out their tasks safely and effectively
10. maintain accurate and confidential records of induction activity, in line with your organisation's policies and procedures

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Plan, organise and monitor volunteering activities

### Overview

This unit is about planning, organising and monitoring volunteering activities.

It involves: planning activities in line with your organisation's strategic goals, policies and procedures; organising volunteers and other resources; and monitoring activities to ensure requirements have been met.

## Key Area D

### Manage and develop volunteers

### Performance Standards

#### Plan volunteering activities

1. collect sufficient information about the activities that need to be done in order to understand
  - the outcomes you must achieve
  - the order in which activities need to happen to achieve the outcomes
  - when the outcomes are required
  - the quality standards outcomes must meet
  - the resources available
2. identify appropriate ways of working, taking into account the diverse abilities, styles and motivations of volunteers
3. identify the types and numbers of volunteers required and the resources they will need to support their activities
4. identify any risks or potential difficulties and take appropriate action to minimise their likelihood/impact and make plans to deal with them, should they arise
5. make sure your plans are in line with your organisation's policies, procedures and budget
6. record your plans in ways that will help you to put them into practice and communicate them to others
7. discuss your plans with colleagues and decision-makers and gain their approval, where required

#### Organise volunteers and other resources

8. identify the specific volunteers and other resources you need for each aspect of your plan
9. negotiate with volunteers, colleagues, suppliers and decision-makers to make sure volunteers and other resources are available as planned
10. review your plans, if the necessary volunteers and resources are not available
11. gain any approval required for the planned activities to begin



D1



**Monitor activities and make sure requirements have been met**

- 12. check progress to make sure activities are on time and within budget and that the outcomes meet quality standards
- 13. closely monitor risk and any aspect of the activities which are likely to give rise to difficulties
- 14. promptly identify any difficulties and work with your volunteers, colleagues, suppliers and decision-makers to deal with these effectively
- 15. keep volunteers, colleagues and decision-makers informed of progress of any changes to your plans
- 16. evaluate activities and not the lessons for future work.

**To find out what knowledge and requirements have been met understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal standards qualities are relevant to this unit please see the matrix in section 4**



## Lead and motivate volunteers

### Overview

This unit is about leading and motivating volunteers.

It involves: informing volunteers about their activities and responsibilities; supporting them during volunteering activities and discussing activities and exchanging feedback with volunteers.

### Performance Standards

#### Inform volunteers about their activities and responsibilities

1. choose appropriate times and places to inform volunteers about their activities and responsibilities
2. explain the purpose and value of the activities that you want volunteers to do and encourage them to achieve high standards
3. encourage and support volunteers to take ownership of the activities and to suggest ways of working appropriate to their diverse needs, abilities and potential
4. encourage and support volunteers to identify any risks or potential difficulties and take appropriate action to minimise their likelihood/impact and make plans to deal with them, should they arise
5. agree individual responsibilities and ways of working with each volunteer and make sure they understand what is expected of them and are confident about taking on these responsibilities
6. agree with each volunteer the limits of their responsibilities, clearly specifying anything they are not allowed to do
7. agree with volunteers how they should communicate with you and with each other
8. communicate clearly and effectively with volunteers at all times in ways that meet their diverse needs and show respect for their volunteer role

#### Support volunteers during volunteering activities

9. monitor volunteering activities to ensure they are progressing satisfactorily
10. provide feedback to volunteers and encourage them to continue their activities successfully
11. provide support to help volunteers overcome difficulties, if necessary
12. promote a culture in which individuals are not blamed for difficulties, but that these are seen as an opportunity for learning



13. work with volunteers and others involved to identify solutions that are acceptable to them and in line with your organisation's objectives, policies and procedures

**Discuss activities and exchange feedback with volunteers**

14. choose appropriate times and places to discuss activities and exchange feedback with volunteers
15. clearly explain the purpose of the discussion and encourage open and honest communication
16. encourage and support volunteers to reflect on their activities and provide objective feedback to you
17. give volunteers an objective and balanced evaluation of their activities
18. acknowledge and celebrate volunteers' achievements in order to encourage and motivate them
19. provide constructive suggestions to improve volunteers' effectiveness and agree these with the volunteers involved
20. identify where volunteers may need additional support and make this available, where appropriate

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Support the development of volunteers' knowledge, skills and competence

### Overview

This unit is about supporting the development of volunteers' knowledge, skills and competence.

It involves working with volunteers to help them plan and evaluate their learning and development, and making available suitable opportunities.

### Performance Standards

#### Performance Standards

##### Work with volunteers to help them plan their learning and development

1. acknowledge the value of volunteers' previous experience and current knowledge, skills and competence to their volunteer roles
2. identify any knowledge, skills and competence individual volunteers need to develop for their present and likely future roles
3. identify the learning and development that volunteers hope to experience through their volunteer activities
4. inform volunteers of the range of learning and development opportunities available to them
5. work with volunteers to identify and prioritise learning and development objectives, taking into account
  - any knowledge, skills and competence they need to develop for their volunteer roles within your organisation
  - the learning and development they hope to experience
  - your organisation's resources available for learning and development
6. identify and seek approval for the resources necessary for volunteers' learning and development



**Make available suitable learning and development opportunities for volunteers**

7. involve appropriate people, including other volunteers, in providing learning and development opportunities
8. ensure the learning and development opportunities you provide
  - meet priority learning and development objectives
  - are appropriate to the diverse needs, preferences, abilities and potential of the volunteers
  - make cost-effective use of the resources available
  - promote equality of access to learning and development opportunities
  - include action plans to put what they have learnt into practice
9. effectively integrate the range of learning and development opportunities provided and co-ordinate the contributions of different providers
10. monitor the effectiveness of learning and development opportunities and review them where required

**Help volunteers evaluate their learning and development**

11. identify whether prioritised learning and development objectives have been met
12. identify volunteers' views on their learning experience
13. help volunteers understand how their learning and development
  - enables them to make a wider contribution to your organisation's goals
  - provides them with transferable knowledge, skills and competence that they can use outside the volunteering context
14. identify any difficulties with the learning and development opportunities provided
15. use the findings of the evaluation to improve learning and development for volunteers in the future

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Provide one-to-one support to help volunteers develop

### Overview

This unit is about the process of providing one-to-one support to help volunteers develop.

It involves: establishing the parameters of support; helping volunteers to develop their skills and behaviours; and helping them apply their developing skills and behaviours to their role.

### Performance Standards

#### Performance Standards

##### Establish the parameters of support to develop the individual's skills and behaviours

1. establish with the individual the area(s) in which they require support
2. support the individual to identify the specific objectives they wish to achieve
3. identify the particular needs, abilities and preferences of the individual and take these into account
4. encourage the individual to understand their motivation to achieve their objectives
5. explore with the individual obstacles which could hinder progress towards their objectives and how to remove these obstacles
6. agree with the individual times, duration, frequency and location of the one-to-one support
7. agree with the individual what they can expect from you and what you can expect from them
8. agree with the individual any other requirements for the coaching process, including requirements for confidentiality

##### Help the individual to develop their skills and behaviours

9. identify with the individual the skills they already have and the behaviours they use to achieve results
10. identify with the individual the skills they need to develop and the behaviours they need to change to achieve their objectives
11. analyse the skills they need and plan how they can develop these step-by-step in a logical sequence



12. use appropriate techniques to help the individual develop the skills they need and practice these in a safe environment
13. analyse the behaviours which are preventing them achieving their objectives and explore with the individual alternative behaviours they can use
14. provide opportunities for the individual to practice alternative behaviours in a safe environment and develop their confidence in using these behaviours
15. encourage the individual to reflect on their progress and articulate their thoughts and feelings about it
16. monitor the individual's progress and provide specific feedback designed to improve their skills, encourage successful behaviours and enhance their motivation to achieve their objectives
17. use alternative techniques or opportunities to help the individual develop their skills and behaviours, if the ones originally tried prove ineffective
18. consult other colleagues or specialists, with the individual's permission, if the individual continues not to make satisfactory progress

**Help the individual apply their developing skills and behaviours**

19. identify suitable opportunities for the individual to apply their developing skills and behaviours
20. identify and assess any risks involved in applying their developing skills and behaviours and plan how to reduce these risks to acceptable levels
21. encourage the individual to articulate clearly how they will apply their developing skills and behaviours and the results they expect to achieve
22. encourage the individual to seize suitable opportunities to apply their developing skills and behaviours, safely and under supervision, where appropriate

23. encourage the individual to seek feedback from others on their application of their developing skills and behaviours
24. encourage the individual to reflect on their use of their developing skills and behaviours and the results they have achieved, and articulate their thoughts and feelings
25. provide specific feedback to the individual on their application of their developing skills and behaviours and agree with them what was successful and what was not
26. identify any areas where the individual needs to develop their skills and behaviours further and agree with them how to do so
27. encourage the individual to continue to identify and seize suitable opportunities to apply their developing skills and behaviours and reinforce their confidence in using them
28. agree the conclusion of the one-to-one support when the individual is confident in the use of their developing skills and behaviours, or when no further progress is being made

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Enable volunteers to learn in groups

### Overview

This unit is about enabling volunteers to learn in groups.

It involves: preparing for the session, taking into account the diverse needs, abilities and preferences of the volunteers involved; facilitating the session through appropriate activities and management of the group dynamics; and reviewing and evaluating the session in order to improve future events.

### Performance Standards

#### Prepare for a group learning session

1. establish the purpose of the learning session and define the intended outcomes – what the participants should know or be able to do at the end of the session – which meet the participants' needs and are achievable within the time available
2. take account of the diverse needs, abilities and preferences of the participants when preparing for a group learning session
3. select learning activities which will help participants achieve the intended outcomes safely and effectively, taking account of the need to provide a variety of types of learning activities in order to maintain levels of attention and participation and cater for participants' diverse learning styles
4. prepare alternative learning strategies that could be used, if the learning activities originally selected prove not to be effective
5. identify any equipment and materials required for the learning session and make arrangements for these to be available
6. select a suitable venue and time for the learning session, in order to allow the participants to attend
7. brief the participants about the learning session – its purpose, desired outcomes, types of learning activities and what will they will be expected to do – sufficiently in advance to allow them to prepare effectively
8. arrive at the venue in good time to allow you to check that it is safe and suitably arranged and that all required equipment and materials are available
9. greet and welcome each participant individually, where possible, to establish an atmosphere of friendly professionalism



### Facilitate a group learning session

10. check that all the participants are clear about the purpose of the learning session and its intended outcomes and are committed to working to achieve these
11. establish the ground rules – what the participants can expect from you and each other, and what you expect from them during the learning session – including any requirements for confidentiality
12. provide opportunities for the participants to get to know each other and identify what they can contribute to, and what they want to get out of, the learning session
13. deploy learning activities appropriately, encouraging everyone to participate effectively and using alternative strategies, if those originally selected prove not to be effective
14. encourage the participants to contribute their knowledge, skills and experience to enhance the learning process
15. ensure that the manner, level and pace of communication are appropriate to the participants' diverse needs, abilities and preferences
16. intervene appropriately in group activities to maximise participants' learning
17. monitor the progress of individuals and the group as a whole and provide timely feedback designed to encourage learning
18. challenge any inappropriate or discriminatory behaviour amongst participants
19. manage any conflict amongst the participants in ways that ensures they can continue to learn

### Review and evaluate group learning

20. review the group learning session with the participants involved in ways which
  - consolidate participants' learning through reflection on the knowledge they may have acquired and the skills they may have practised and developed
  - enable participants to articulate their thoughts and feelings about the session as a whole
  - establish the extent to which the intended outcomes have been achieved
  - identify the effectiveness of individual activities
  - provide feedback to you and to other participants on aspects which either helped or hindered their learning
  - provide feedback on other aspects of the learning session, such as the venue, timing, catering and administration
21. invite the participants to complete formal written evaluations, where these are required
22. use the information from the review and any formal evaluations to identify ways in which group learning sessions could be improved in the future

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Maintain records of volunteers

### Overview

This unit is about maintaining records of volunteers by gathering and recording personal information about volunteers within the parameters of data protection legislation and using the personal information in line with confidentiality requirements.

### Performance Standards

#### Record personal information about volunteers

1. identify the personal information about volunteers required and why this information is required
2. help volunteers understand why you need to record personal information and the purposes to which it will be put
3. obtain volunteers' permission to process their personal information for the specified purposes only
4. obtain complete and accurate personal information from all volunteers in your area of responsibility
5. record personal information about volunteers accurately in secure systems that comply with legal and organisational requirements
6. ensure the methods you use to obtain and record personal information about volunteers are cost-effective and time-effective

#### Use personal information about volunteers in line with confidentiality requirements

7. keep records of personal information about volunteers complete, accurate and up-to-date
8. provide volunteers with access to their own records to ensure they are complete, accurate and up-to-date
9. use personal information about volunteers only for the specified purposes, in line with legal and organisational requirements
10. deny unauthorised persons access to personal information about volunteers
11. agree with volunteers what personal information is retained and for what purposes when they stop their volunteering commitment with your organisation



D6

- A1 A2 A3 A4 A5 B1 B2 C1 C2 C3 C4 C5 D1 D2
- D3 D4 D5 D6 D7 D8 E1 E2 E3 E4 E5 E6 F1 F2
- F3 F4 F5 F6 F7 F8 F9 F10 F11

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Manage volunteers' expenses

### Overview

This unit is about managing volunteers' expenses.

It involves reimbursing expenses, maintaining records of expenses and dealing with anomalies in line with your organisation's policy.

### Performance Standards

#### Reimburse volunteer's expenses

1. help volunteers clearly understand your organisation's policy on expenses – what expenses it will reimburse and what expenses it will not
2. agree with volunteers the procedure for reimbursing expenses and when they will be reimbursed
3. encourage volunteers to claim expenses in line with your organisation's policy
4. verify that volunteers' expenses have actually been incurred and that they are reimbursable under your organisation's policy
5. reimburse volunteers expenses according to the agreed procedure and timeframe, obtaining a receipt if expenses are reimbursed in cash
6. ensure that volunteers understand their responsibility to maintain records of their own expenses for tax purposes

#### Maintain records of expenses and deal with anomalies

7. maintain accurate records of expenses claimed and reimbursed in secure systems that comply with legal and organisational requirements
8. review records of expenses periodically to identify any anomalies in patterns of claiming
9. check out any anomalies with the volunteers involved and identify the reason for the anomalies
10. report any unexplained anomalies to the appropriate authority

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Help address problems affecting volunteers

### Overview

This unit is about helping to address problems affecting volunteers.

It involves helping volunteers to address problems affecting them, which may be work, social or personal problems, and helping to address problems with volunteers' performance and conduct.

### Performance Standards

#### Help volunteers address problems affecting them

1. help volunteers understand
  - your organisation's policies for helping to address problems affecting them
  - how they can communicate problems to you or to other appropriate members of your organisation
2. invite volunteers to discuss problems with you whenever there are indications that problems are affecting them
3. identify problems that are beyond your competence, and refer volunteers to other appropriate members of your organisation or specialist services
4. provide volunteers with appropriate support to help them decide how to address problems affecting them
5. monitor the situation and provide appropriate further support as necessary
6. treat all information about the problems affecting volunteers confidentially

#### Help address problems with volunteers' performance and conduct

7. help volunteers understand
  - the standards of performance and conduct expected of them
  - your organisation's policies and procedures for addressing problems with volunteers' performance and conduct
8. promptly identify and investigate complaints about volunteers' performance or conduct
9. obtain and verify information about the problem from all those involved
10. discuss the problem directly with the volunteer involved in an appropriate way and agree with them the nature and consequences of the problem



11. identify problems that are outside your area of responsibility, and refer volunteers to other appropriate members of your organisation or an external authority
12. agree with the volunteer an appropriate and timely course of action and communicate this to relevant people
13. monitor and review the situation with the volunteer involved and other relevant people
14. take appropriate action in line with your organisation's policies and procedures when a positive outcome cannot be achieved
15. record information accurately and treat all information confidentially, in line with your organisation's policies and procedures

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Manage and continuously develop your resources for managing volunteers

### Overview

This unit is about managing and continuously developing your personal resources for managing volunteers.

It involves identifying and evaluating your own values, motivations and aspirations; managing your own time and personal resources to achieve your objectives; and continuously developing your own knowledge, skills and competence in managing volunteers.

## Key Area E

### Manage yourself, your relationships and your responsibilities

### Performance Standards

#### Identify and evaluate your own values, motivations and aspirations

1. identify your values, motivations and aspirations in relation to managing volunteers
2. evaluate your own values, motivations and aspirations in the context of your organisation's goals, objectives and values
3. explore how your values, motivations and aspirations impact on your work, on volunteers and on other stakeholders
4. identify areas where your values, motivations and aspirations could be adapted to support the goals, objectives and values of your organisation and have a more positive impact on your work and on volunteers
5. share the outcomes of your evaluation with others and take account of their feedback

#### Manage your own time and personal resources to achieve your objectives

6. develop aims and objectives for your area of responsibility which are compatible with the goals and objectives of your organisation
7. prioritise your objectives and manage your time in order to achieve them
8. delegate objectives and responsibilities where this is possible and appropriate
9. identify and respond quickly and positively to new opportunities and urgent situations when they emerge, revising your objectives and priorities as necessary
10. be flexible in responding to changing situations and new challenges
11. manage your emotions and relationships with others in ways that help you achieve your objectives
12. use technology effectively to help you achieve your objectives
13. achieve an equitable balance between your professional and personal life



### **Continuously develop your own knowledge, skills and competence in managing volunteers**

14. assess your performance in achieving your aims and objectives at appropriate intervals
15. seek and take account of feedback from others on your performance
16. take account of future requirements that may arise from your own and your organisation's plans
17. evaluate all available information to identify your personal and professional development needs
18. develop plans for your personal and professional development that are consistent with your identified needs
19. make sure your plans are realistic and achievable in terms of your potential and circumstances
20. seek resources to support your personal and professional development
21. take part in development activities that are consistent with your plans and your personal learning style
22. evaluate the quality and relevance of these development activities and the impact they have on your performance, using feedback from others
23. review and update your development plans at appropriate intervals

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Manage and continuously develop your own and others' capacity for managing volunteers

### Overview

This unit is about managing and continuously developing your own and others' capacity for managing volunteers.

It involves: identifying and evaluating your own values, motivations and aspirations; managing your own time and personal resources to achieve your objectives; continuously developing your own knowledge, skills and competence; and contributing to the wider pool of knowledge about managing volunteers.

### Performance Standards

#### Identify and evaluate your own values, motivations and aspirations

1. identify your values, motivations and aspirations in relation to managing volunteers
2. evaluate your own values, motivations and aspirations in the context of your organisation's goals, objectives and values
3. explore how your values, motivations and aspirations impact on your work, on volunteers and on other stakeholders
4. identify areas where your values, motivations and aspirations could be adapted to support the goals, objectives and values of your organisation and have a more positive impact on your work and on volunteers
5. share the outcomes of your evaluation with others and take account of their feedback
6. Manage your own time and personal resources to achieve your objectives
7. develop aims and objectives for your area of responsibility which are compatible with the goals and objectives of your organisation
8. prioritise your objectives and manage your time in order to achieve them
9. delegate objectives and responsibilities where this is possible and appropriate
10. identify and respond quickly and positively to new opportunities and urgent situations when they emerge, revising your objectives and priorities as necessary
11. be flexible in responding to changing situations and new challenges
12. manage your emotions and relationships with others in ways that help you achieve your objectives
13. use technology effectively to help you achieve your objectives
14. achieve an equitable balance between your professional and personal life
15. continuously develop your own knowledge, skills and competence in managing volunteers



16. assess your performance in achieving your aims and objectives at appropriate intervals
17. seek and take account of feedback from others on your performance
18. take account of future requirements that may arise from your own and your organisation's plans
19. evaluate all available information to identify your personal and professional development needs
20. develop plans for your personal and professional development that are consistent with your identified needs
21. make sure your plans are realistic and achievable in terms of your potential and circumstances
22. seek resources to support your personal and professional development
23. take part in development activities that are consistent with your plans and your personal learning style
24. evaluate the quality and relevance of these development activities and the impact they have on your performance, using feedback from others
25. review and update your development plans at appropriate intervals

**Contribute to the wider pool of knowledge about managing volunteers**

26. identify areas of your current experience and knowledge that you feel could make a contribution to the wider pool of knowledge about managing volunteers
27. identify others who could assist you to develop this knowledge further
28. encourage others to review the knowledge you have developed and take account of their feedback
29. enhance and refine this knowledge through debate and further research
30. identify effective ways of disseminating knowledge to your intended audience
31. structure and present the knowledge you have developed, together with evidence and supporting rationale in appropriate ways
32. acknowledge the contributions of other people as appropriate
33. seek feedback on the knowledge you have disseminated and use this to develop your knowledge further

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Develop productive working relationships with volunteers and other stakeholders

### Overview

This unit is about developing productive working relationships with volunteers, colleagues, your manager and external stakeholders (individuals or organisations who have a legitimate interest in your work).

### Performance Standards

#### Develop productive working relationships with volunteers

1. help volunteers understand
  - their motivations for volunteering
  - how volunteering can meet their needs and expectations
  - what they can expect from you and your organisation
  - what you and your organisation expect of them
  - the standards of conduct and behaviour expected of them
2. consult with volunteers about proposed activities at appropriate times and in ways that encourage open, frank discussion
3. keep volunteers informed about plans and activities, emerging threats and opportunities
4. honour the commitments you make to volunteers
5. treat volunteers in ways that show your respect for them and their right to confidentiality
6. engage volunteers in activities that both meet their needs and expectations and allow them to make tangible contributions to achieving the organisation's goals
7. give volunteers sufficient support to allow them to carry out their tasks safely and effectively
8. give volunteers regular, accurate and balanced feedback on their contributions and their value to the organisation

#### Develop productive working relationships with colleagues

9. consult with colleagues about proposed activities at appropriate times and in ways that encourage open, frank discussion
10. keep colleagues informed about plans and activities, emerging threats and opportunities



11. honour the commitments you make to colleagues
12. treat colleagues in ways that show your respect for them and their right to confidentiality
13. give colleagues support to help them achieve their work objectives
14. give colleagues clear and specific feedback on their work and behaviour in ways designed to help improve their effectiveness

#### **Develop a productive working relationship with your manager**

15. agree with your manager the results you should achieve and the standards of performance and conduct expected of you
16. give your manager timely and accurate reports on your plans, activities, progress and results
17. give your manager clear and accurate information about emerging threats and opportunities with a degree of urgency appropriate to the situation
18. consult your manager about organisational policies and ways of working at appropriate times
19. present your manager with clear and realistic proposals at appropriate times
20. make constructive efforts to resolve disagreements and maintain a good working relationship with your manager, where you have disagreements

#### **Develop productive working relationships with stakeholders**

21. identify stakeholders and their interests in your work – how it might benefit or harm them – and how they may be able to help or hinder your activities
22. encourage an open dialogue with stakeholders, keeping them informed about your plans, activities, progress and results, and inviting them to discuss with you any concerns they may have
23. agree with stakeholders any specific support for your work they are able to provide, and vice versa

24. honour commitments you make to stakeholders
25. review your working relationships with stakeholders at appropriate times and agree ways in which these relationships can become more productive

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Promote productive working relationships between volunteers and other stakeholders

### Overview

This unit is about ensuring that volunteers work effectively together and with other stakeholders, such as paid colleagues within your organisation or partners from other organisations.

It involves: ensuring that there is mutual understanding of each others' roles, responsibilities and unique contributions to your organisation's goals; and dealing with interpersonal conflicts if these arise.

### Performance Standards

#### Promote understanding and mutual esteem between volunteers and other stakeholders

1. help volunteers understand
  - their own role, responsibilities and unique contribution to the organisation's goals
  - the roles, responsibilities and unique contributions to the organisation's goals of other volunteers and stakeholders with whom they are working
2. where volunteers have more than one role (eg a caring role and a governance role as a trustee), help them keep these roles distinct
3. help other stakeholders understand volunteers' roles, responsibilities and unique contributions to the organisation's goals
4. provide opportunities for volunteers and other stakeholders to
  - get to know each other personally
  - gain a fuller understanding of each others' roles, responsibilities and unique contributions to the organisation's goals
  - appreciate the knowledge, skills and competences they have to offer each other
  - understand how they can support each other
5. agree with volunteers and other stakeholders how they should work together and communicate with each other
6. identify and address any issues with organisational structures, systems or procedures that could impede productive working relationships between volunteers and other stakeholders



### Deal with interpersonal conflicts

7. identify potential difficulties and conflicts and take action to avoid these
8. encourage volunteers and other stakeholders to resolve their own difficulties and conflicts amongst themselves
9. take prompt action to deal with conflicts where those involved are not able to resolve the conflicts themselves
10. acknowledge and show respect for people's emotions regarding the conflict and seek to manage any negative emotions
11. investigate impartially the causes of the conflict, giving everyone involved opportunities to present the facts and their perceptions about the conflict
12. identify and agree with those involved how to resolve the conflict, without apportioning blame
13. seek help from colleagues or specialists, where necessary
14. comply with legal and organisational requirements when dealing with conflicts

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Develop and maintain partnership working to support your volunteering strategy

### Overview

This unit is about developing and maintaining effective partnerships with individuals and organisations that can support your volunteering strategy.

It involves: identifying and evaluating individuals and organisations that can support your volunteering strategy; agreeing mutual expectations and protocols; and working in partnership with these individuals and organisations.

### Performance Standards

#### Identify and evaluate individuals and organisations that can support your volunteering strategy

1. identify the individuals and organisations that could support your volunteering strategy and how they might do so
2. identify the investment of time and money required to develop relationships with individuals and organisations and the potential benefits of their support
3. identify the reasons why individuals and organisations might wish to support your volunteering strategy and the potential benefits and costs to them of doing so
4. identify the values of individuals and organisations and evaluate how well these align with your organisation's values
5. identify and assess any risks involved in working with individuals and organisations
6. calculate the net potential benefits to your organisation of working with individuals and organisations
7. base your decision to work with individuals and organisations on an accurate evaluation of the net potential benefits, how well your values align and the risks involved

#### Agree mutual expectations and protocols for working with individuals and organisations

8. identify and agree with individuals and organisations that support your volunteering strategy
  - the benefits each party is expecting to achieve through working together
  - the actions each party is going to take in working together and when they are going to take these actions
  - protocols for efficient and effective communication and reporting



- protocols for processing information, in line with current legislation
  - how and when you will review the agreement and the benefits it is delivering to each party
9. ensure your agreement with individuals and organisations has a level of formality, commensurate with the potential benefits, costs and risks involved
  10. communicate relevant details of your agreement to those who need to know

**Work in partnership with individuals and organisations that can support your volunteering strategy**

11. carry out your actions as agreed
12. inform individuals and organisations promptly if you are unable to complete your actions as agreed and explain the reasons for this
13. support the individuals and organisations to take their actions as agreed
14. report and receive reports on progress according to agreed protocols
15. provide feedback to individuals and organisations on their actions in ways that help them perform effectively and reinforce their commitment and enthusiasm for working together with you
16. acknowledge the value of the contributions of individuals and organisations and the benefits these bring to your organisation
17. process information supplied by the individuals and organisations, in line with agreed protocols

**Review relationships with individuals and organisations**

18. review relationships with individuals and organisations at the times agreed
19. identify and agree
  - the actions carried out by each party, any deviations from the actions agreed and the reasons for these
  - any failures or mistakes, the reasons for these and ways of avoiding these failures or mistakes in the future
  - the costs to each party of working together and ways in which these costs may be reduced in the future
  - the benefits to each party, the value of these benefits and how mutual benefits may be increased in the future
  - the extent to which the expectations of each party have been met
  - ways in which actions and protocols should be changed to make the partnership more effective in the future

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Identify, assess and control health and safety risks

### Overview

This unit is about identifying, assessing and controlling health and safety risks.

It involves: identifying and evaluating potential hazards; determining health and safety risks; and determining and implementing risk control measures and safe systems of work.

### Performance Standards

#### Identify and evaluate hazards to health and safety

1. inspect the workplace to identify and evaluate the hazards to the safety of volunteers/ employees, other people who may be affected, and physical resources
2. observe work activities to identify and evaluate the hazards to the safety of volunteers/ employees, other people who may be affected, and physical resources
3. examine proposed and new workplaces, equipment, processes or activities in order to identify and evaluate the hazards to the safety of volunteers/ employees, other people who may be affected and physical resources
4. inspect the workplace to identify and evaluate the hazards to the health of volunteers/ employees and other people who may be affected
5. observe work activities to identify and evaluate the hazards to the health of volunteers/ employees and other people who may be affected
6. examine proposed and new workplaces, equipment, processes and activities in order to identify and evaluate the hazards to the health of volunteers/ employees and other people who may be affected
7. select and use appropriate measuring equipment
8. keep appropriate records of the hazards

#### Determine health and safety risks

9. determine risks to safety in the workplace to volunteers/ employees, other people who may be affected, and physical resources
10. determine risks to health in the workplace to volunteers/ employees and other people who may be affected, taking into account existing control measures, the population at risk, the nature of the harm and the likelihood of the occurrence



11. select and use suitable techniques to determine and analyse risks
12. decide the tolerability and/or acceptability of risk
13. select and use appropriate instruments and survey techniques to determine the exposure of volunteers/ employees and other people who may be affected
14. keep appropriate records of the risks

**Determine and implement risk control measures and safe systems of work**

15. identify and evaluate the existing risk control measures and current systems of work in your organisation
16. recognise your own limits and, where necessary, bring in specialist or other assistance
17. identify any additional or improved risk control measures that may be needed in your organisation
18. identify and take into consideration the risk control measures required by health and safety legal requirements relevant to your organisation and industry best practice
19. involve managers, employee representatives and/or volunteers/ employees in consultation about the risk controls
20. identify the resources and cost-effectiveness of the risk control measures needed
21. assist in the implementation of risk control measures in your organisation
22. make sure that all those people affected receive the necessary training to gain the competence required for the implementation of risk control measures

23. keep appropriate records of risk control measures

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Promote your organisation and its services to stakeholders

### Overview

This unit is about communicating the benefits of your organisation and its activities to stakeholders, such as the local authority, funders, commissioners, partners, service users etc.

It involves planning to promote your organisation and services and communicating key messages to stakeholders.

## Key Area F

### Provide management support for volunteering programmes

### Performance Standards

#### Plan to promote your organisation and its services

1. identify the groups of stakeholders you wish to promote your organisation and its services to
2. consult with representatives of these stakeholders to understand their actual or potential interests in your organisation and its services
3. define the key messages that you want to communicate to the different stakeholders, taking account of their diverse interests, needs, abilities and preferences
4. identify opportunities to promote your organisation and its services to stakeholders and select those which likely to be most effective in communicating your messages within the resources available
5. identify and obtain the resources required for your promotional plans
6. communicate your promotional plans to those who need to know about them
7. ensure that those who promote your organisation and its services have the knowledge, skills and competence to be able to do so
8. identify how the effectiveness of your promotional activities will be measured

#### Communicate key messages to stakeholders

9. use selected opportunities to promote your organisation and its services to stakeholders in line with your promotional plan
10. seize ad hoc opportunities to promote your organisation and its services to stakeholders as they arise
11. communicate key messages promptly in response to a crisis
12. communicate clearly with stakeholders in ways designed to help them understand the key messages and how they affect them
13. ensure the information you communicate is accurate, up-to-date and in line with organisational requirements



14. communicate in ways that respect individuals' rights and the requirements of confidentiality
15. provide stakeholders with opportunities to seek clarification and provide feedback
16. evaluate your promotional activities to improve their effectiveness in the future

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Manage projects involving volunteers

### Overview

This unit is about planning, running and completing projects that involve or impact on volunteers.

It involves: planning and preparing projects; managing the running of projects; and completing and evaluating projects involving volunteers.

An important feature of effective performance in this unit is close liaison with stakeholders such as volunteers, paid staff, decision-makers (eg trustees, committee members, senior managers), beneficiaries, partner organisations and funding organisations.

### Performance Standards

#### Plan and prepare projects involving volunteers

1. consult with the project sponsor, decision-makers, volunteers and other stakeholders to develop a clear vision, scope and definition for the project
2. assess the main benefits of the project for your organisation, volunteers and beneficiaries
3. assess the risks associated with the project and determine how the likelihood and impact of risks can be reduced to acceptable levels
4. develop plans for the project that are consistent with its scope, definition and risks
5. identify all the main project components
6. gain the support of volunteers involved in the project, taking account of their needs, abilities, preferences and potential
7. establish clearly who will be responsible for managing the volunteers involved in the project
8. define a communication plan to ensure those who need to know about the project are kept up-to-date in a timely way
9. identify and obtain the necessary financial and physical resources to support your project plans
10. record and present your plans to sponsors, decision-makers and stakeholders and negotiate revisions to your plans as necessary

#### Manage the running of projects involving volunteers

11. communicate to your volunteers a clear vision for the project and the key stages of the project plan
12. motivate your volunteers to fulfil their roles with commitment and enthusiasm, using methods appropriate to their needs, abilities and preferences
13. monitor all aspects of the project, identifying new and emerging challenges and engaging your volunteers in developing effective solutions



14. continuously reassess the likelihood and impact of risks associated with the project and take action to reduce these to acceptable levels
15. provide your volunteers with support and encouragement when they need them
16. monitor progress against your plans, making and recording revisions to your plans, consistent with the project's overall aims and objectives
17. when necessary, renegotiate the project's aims and objectives with the project sponsor in ways that are acceptable to your stakeholders
18. manage change in the project in ways that cause minimum disruption and maintain volunteers' motivation and commitment
19. communicate progress and issues associated with the project to decision-makers and project sponsors, seeking their guidance and support as required
20. keep stakeholders informed of progress and seek to engage them in the project

### **Complete and evaluate projects involving volunteers**

21. confirm that the project's aims and objectives have been achieved to the planned schedule, cost and quality criteria or develop a clear and justifiable rationale for not achieving certain aims, objectives and requirements
22. make sure all the outcomes from the project are delivered as agreed
23. confirm the project's completion with all those involved and bring project work to an end
24. ensure the timely completion of all financial, personnel and administrative arrangements associated with the project
25. provide all the required reports and records
26. collect feedback from all those involved on the project's effectiveness and their levels of satisfaction
27. evaluate all aspects of the project using project information and feedback
28. share your evaluation with those involved and take account of their feedback
29. record your final evaluation and note the learning points for the future

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Obtain funds for your organisation's volunteering policies and plans

### Overview

This unit is about obtaining funds for volunteering policies and plans.

It involves: identifying sources of funding; preparing an application; and negotiating and agreeing funding.

In identifying funding sources it is important to consult widely with decision-makers (such as trustees, committee members and senior managers) and stakeholders (such as volunteers, those who benefit from their work, paid staff, partner organisations and existing funders).

### Performance Standards

#### Identify sources of funding

1. quantify the funding required to implement your plans
2. identify funding that is already available and likely shortfalls
3. prioritise those areas of greatest need and importance
4. collect and store accurate and up-to-date information on potential funding sources and the conditions and criteria that apply to them
5. check if anyone else in your organisation has a relationship with the identified funding sources and avoid any duplicated effort
6. analyse information about funding sources and identify those sources
  - for which your organisation's plans will broadly qualify, and
  - which are compatible with your organisation's values and ethos
7. confirm your analysis with the funding sources involved
8. provide decision-makers and stakeholders with information about the funding sources you have identified and prioritised, and take account of their feedback

#### Prepare an application for funding

9. collect and analyse all documentation and other information relevant to preparing the specific application
10. clarify all conditions and criteria relating to the application
11. draw on your own experience and other sources of expertise relevant to making similar applications
12. draft your application in a way which
  - meets the requirements of the funding source,
  - makes a compelling business case for the funding, and
  - shows clearly how your organisation and its values, ethos, policies and plans meet the funding source's conditions and criteria



13. obtain feedback on your draft application from colleagues and/or experts, and take their feedback into account when finalising tenders and bids
14. provide the funding source with your completed application within the timescales specified
15. provide any additional information and clarifications that the funding source requires

#### **Negotiate and agree funding**

16. where the funding source requests changes to your application, check that these changes are still compatible with your organisation's values, ethos, policies and plans
17. if the requested changes are incompatible with your organisation's values, ethos, policies and plans, make this clear to the funding source and attempt to negotiate an agreed outcome
18. keep decision-makers in your organisation informed of negotiations and draw on their support, if necessary
19. make agreed changes to your application
20. maintain an effective working relationship with the funding source throughout the negotiations
21. record all aspects of the negotiations and store these securely

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Manage an expenditure budget for volunteering activities

### Overview

This unit is about making sure you use financial resources effectively and efficiently for specific projects and programmes of work.

It involves developing a budget for the financial resources you need and controlling expenditure against this budget.

### Performance Standards

#### Develop an expenditure budget

1. invite those who will be using the resources to be involved in developing the budget for expenditure in your area of responsibility
2. ensure that your budget takes account of past experience, trends, developments, risks and other factors likely to affect future expenditure
3. clearly state the expected benefits from the recommended expenditure, and any potential negative consequences
4. ensure that, where you have considered alternative options for expenditure, you provide valid reasons for having rejected them
5. develop contingency plans for dealing with risks should these materialise
6. provide sufficient, valid information for decision-makers to approve your expenditure budget
7. ensure that your expenditure budget complies with organisational, legal, regulatory and funding requirements
8. refer to specialists, if you need advice or support in preparing an expenditure budget
9. present your budget to decision-makers in an appropriate format and at an appropriate time

#### Control expenditure against the budget

10. give those who will be using the resources clear and consistent advice on how they can help to control expenditure
11. give those who will be using the resources opportunities to take individual responsibility for monitoring and controlling expenditure
12. ensure that your methods of monitoring expenditure are reliable and comply with organisational, legal, regulatory and funding requirements
13. monitor expenditure against the budget at agreed intervals



14. control expenditure in line with the budget and organisational, legal, regulatory and funding requirements
15. take effective corrective action in response to actual or potential significant variations from the budget
16. provide a clear rationale to decision-makers if you need to apply for additional resources
17. refer to specialists, if you need advice or support in controlling expenditure against the budget
18. ensure that your records of expenditure are complete, accurate and available to authorised people only

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Procure supplies for volunteering activities

### Overview

This unit is about obtaining the supplies you need on advantageous terms and ensuring that these are delivered in line with the quantity, quality, and time parameters agreed.

It involves: identifying and selecting suppliers of both goods (equipment, stationery etc) and services (printing, consultancy, cleaning services etc); negotiating and agreeing terms; and monitoring the performance of suppliers.

### Performance Standards

#### Identify and select suppliers

1. clearly establish what supplies are required for your area of responsibility
2. prepare specifications based on these requirements
3. establish clear and valid criteria for the selection of suppliers
4. identify a range of potential suppliers that is sufficiently broad to allow valid comparisons of quality and price to be made
5. invite potential suppliers to make offers against clear and accurate specifications
6. resolve queries from potential suppliers promptly and fairly
7. evaluate offers against the agreed criteria and select the most suitable suppliers
8. comply fully with legal and organisational requirements throughout the process of identifying and selecting suppliers

#### Negotiate and agree terms and conditions with suppliers

9. conduct negotiations for supplies in ways that achieve optimal terms and conditions for your organisation
10. maintain good working relations with suppliers
11. obtain advice from your manager or specialists if you cannot negotiate acceptable terms and conditions within the scope of your authority
12. negotiate agreements that provide required supplies at acceptable cost and under acceptable terms and conditions
13. make sure the agreements are clear, unambiguous and contain all necessary information
14. make sure that agreements provide appropriate protection against their breach
15. maintain clear and accurate records of negotiations and agreements made
16. comply with legal and organisational requirements throughout the process



### Monitor the performance of suppliers

17. check to ensure that suppliers are complying with the terms and conditions of agreements for supplies
18. point out any failure to comply with terms and conditions to suppliers in ways that maintain good working relations
19. agree prompt and effective remedial action with suppliers if they are failing to comply with terms and conditions in a significant way
20. take prompt and effective action if suppliers remain in breach of the agreements
21. comply with legal, organisational and contractual requirements throughout the term of the agreement
22. maintain clear and accurate records of the performance of suppliers and any agreements made to improve performance

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Procure supplies for volunteering activities

### Overview

This unit is about showing that you can efficiently and safely manage the physical resources needed for the volunteering activities for which you are responsible.

It involves identifying and planning the resources you and your team will need, obtaining those resources and monitoring the use of the resources.

### Performance Standards

#### Plan the use of physical resources

1. invite those who use physical resources to contribute to identifying the resources required and planning and monitoring their use
2. assess the risks associated with the use of physical resources
3. develop plans that:
  - identify the range and quantity of physical resources required for planned activities in your area of responsibility, including likely contingencies
  - take account of relevant past experience, trends and developments and factors likely to affect future resource use
  - are consistent with your organisation's values, ethos, objectives, policies and legal requirements
  - reduce the likelihood and impact of any risks to acceptable levels
  - use resources in ways which are efficient and minimise any adverse effect on the environment

#### Obtain physical resources

4. ensure your requests for physical resources clearly show the costs involved and the anticipated benefits you expect from the use of the resources
5. present your requests for physical resources to decision-makers in time for the necessary resources to be obtained
6. present requests for physical resources in ways which reflect the commitment of those who will be using the resources
7. ensure the physical resources you obtain are sufficient to support all activities in your area of responsibility
8. identify alternative resources or make adjustments to your plans, where the requested resources are not available in full
9. make arrangements with suppliers for resources to be available when required



### Monitor the use of physical resources

10. take appropriate action to ensure the security of physical resources
11. provide clear instructions and sufficient training to ensure physical resources are used safely
12. ensure the use of physical resources is efficient and minimises any negative impact on the environment
13. monitor the quality of resources and patterns of resource use continuously
14. monitor the actual use of physical resources against an agreed plan at appropriate intervals
15. take timely corrective action to deal with significant discrepancies between actual and planned resource use
16. continuously reassess the likelihood and impact of risks associated with the use of physical resources and take action to reduce these to acceptable levels
17. maintain complete and accurate records of resource use and make these available to authorised people only

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Organise events involving volunteers

### Overview

This unit is about the organisation of events involving volunteers, such as meetings, seminars, forums, internal conferences, promotional events and social events.

It involves: planning events; locating and arranging venues; organising resources; arranging attendance; coordinating events; and evaluating events.

### Performance Standards

#### Plan events

1. identify the purpose that you want the event to achieve and evaluate with decision-makers and stakeholders whether an event is the most effective option available
2. identify and agree the nature, aims and objectives of the event, its target audience and likely dates and locations
3. ensure the planned event supports your organisation's goals, objectives, values and work programmes
4. establish a budget for the event
5. identify and agree contributors who are most appropriate to the event's aims and objectives and the diverse needs, abilities and preferences of the intended participants
6. identify and agree a programme for the event and identify and plan for contingencies
7. contact and brief likely contributors, obtain their agreement to participate and identify any conditions or particular needs
8. provide contributors with the information they require for the event and take account of any feedback, adjusting your plans and providing updates as necessary
9. record all aspects of your plans for the event in a format that will assist its organisation



### Locate and arrange venues

10. develop clear specifications for the type of venue required
11. collect and analyse information about venues and identify those that meet your specifications
12. contact possible venues, establish how closely they meet the specifications and record any other relevant details
13. consult with decision-makers and other stakeholders on possible venues and agree a shortlist
14. assess those venues on the shortlist and confirm your selection with decision-makers and other stakeholders
15. provide the venue with all the information they require concerning the event
16. identify any possible difficulties with the venue meeting specific requirements for the event and negotiate effective solutions
17. follow your organisation's procedures for agreements and contracts with the selected venue
18. develop a detailed plan as to how the venue will be used during the event

### Organise resources

19. develop clear specifications for the resources required for the event, ensuring they meet the needs of all those who are likely to attend
20. identify and select suppliers who are able to meet these specifications and your organisation's requirements
21. follow your organisation's procedures to have the required resources ordered and delivered to the venue at the correct time
22. deal with any problems with suppliers in line with your organisation's procedures

23. collect and review your contributors' contributions to the event and provide them with feedback
24. determine how the resources will be arranged and used during the event
25. record all information relating to the supply and planned use of resources



F7



### Arrange attendance

26. identify and confirm with decision-makers and other stakeholders those organisations and individuals that should be invited to attend the event
27. make sure there are clear contact details for each organisation and individual
28. send out invitations, containing all the key information about the event, in good time
29. analyse responses to your invitations, revising your plans as necessary
30. provide the participants with clear and accurate joining instructions and any supporting information for the event
31. identify any particular needs that individual participants may have, and make arrangements to meet these
32. deal effectively with any enquiries you receive or problems that arise
33. keep the venue, suppliers and decision-makers informed if there are any implications for their work

### Co-ordinate events

34. ensure that all resources are available and ready for the event as planned
35. ensure that contributors and support staff are available and briefed for the event
36. ensure that all participants are greeted and receive the resources they require
37. monitor the running of the programme, identify any actual and potential problems and deal with these effectively using your contingency plans
38. keep all those involved in the running of the event informed of relevant developments
39. make sure the event is accurately recorded

### Evaluate events

40. seek and collect feedback from those who attended and contributed to the event
41. analyse this feedback and evaluate it against the aims and objectives for the event
42. evaluate the participants' feedback regarding the venue, resources, programme and contributors
43. acknowledge the contributions of participants
44. record all aspects of your evaluation and share them with decision-makers, stakeholders and contributors
45. identify, agree and record the main learning points from your evaluation
46. identify the need for future events, where appropriate

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Manage the quality of services involving volunteers

### Overview

This unit is about setting quality standards and assuring the effectiveness of service provision, as well as implementing improvements in the quality service provision.

It involves: establishing quality standards; assuring quality in line with quality standards; and improving the quality of service provision.

### Performance Standards

#### Establish quality standards for service provision

1. identify any specific quality standards required by legislation, regulatory bodies or funders in respect of the type of services you provide
2. identify any quality marks, awards or accreditation which organisations are expected to have, or be working towards, if they are offering the type of services you provide
3. identify the standards that users of your services expect
4. establish quality standards which
  - comply with legal, regulatory and funders' requirements
  - allow you to obtain any expected quality marks, awards or accreditation
  - meet the standards that users expect
  - are in line with your organisation's values, aims and objectives
5. ensure systems, plans and resources are in place to monitor that required standards are maintained
6. communicate the required standards of service, and the importance of achieving these standards, to those who need to know
7. provide adequate briefing for people to understand their roles in meeting quality standards and sufficient training for them to fulfil their roles
8. seek and obtain advice from your manager or quality specialists, if required
9. regularly review the quality standards to confirm they continue to meet requirements



### Assure the quality of service provision

10. ensure that people are continuously updated about their roles in meeting quality standards and are competent and committed to fulfil their roles
11. encourage people to take personal responsibility for achieving quality standards and to report any actual or potential shortfalls in the quality of service provision
12. monitor the quality of service provision in line with your plan
13. obtain sufficient valid information from your quality assurance system and other sources, including users and the people providing the services, to enable you to evaluate accurately whether services are meeting the required standards
14. provide feedback to motivate people to maintain quality standards and continuously improve performance
15. detect and record any shortfall in the quality of service provision against standards and take prompt corrective action to remedy the shortfall
16. report quality performance, including shortfalls in service provision and corrective actions taken, to those who need to know, within agreed timescales

### Improve the quality of service provision

17. encourage service users and the people providing services to identify and recommend improvements to the quality of service provision
18. evaluate the benefits, costs and risks of potential improvements
19. investigate shortfalls in quality of service provision and seek to identify the causes
20. develop and gain approval for a resourced plan to
  - minimise the causes of shortfalls in quality, and
  - implement improvements which deliver significant benefits at reasonable cost and acceptable level of risk

21. implement your plan, communicating with those who need to know
22. monitor the implementation of improvements to check that
  - shortfalls in quality have been minimised
  - the expected benefits have been achieved within the resources approved
23. review the quality standards in the light of improvements and revise them, as required

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Lead and participate in meetings involving volunteers

### Overview

This unit is about facilitating meetings so that objectives can be achieved. It covers both chairing meetings and attending meetings as a participant.

### Performance Standards

#### Lead meetings

1. give people invited to the meeting sufficient notice and information to allow them to prepare, attend and contribute effectively
2. ensure that people attending understand the objectives of the meeting and how they are expected to contribute
3. order agenda items and allocate time to each item according to its importance, urgency and complexity
4. present information and provide summaries clearly at appropriate points during the meeting
5. use a range of methods, tools and techniques to enable people attending to make useful contributions
6. discourage unhelpful arguments and digressions and challenge any inappropriate or discriminatory behaviour
7. ensure that the meeting achieves its objectives within the allocated time
8. ensure that the agreed decisions and recommendations fall within the group's authority
9. seek feedback from people attending and use this to improve the effectiveness of future meetings
10. give clear, accurate and concise information about decisions and recommendations to those who need it



F9



### Participate in meetings

11. prepare for the meeting in sufficient depth to enable you to participate effectively
12. consult with the people you are representing in order that you can present their views effectively
13. clarify what you want to achieve at the meeting
14. make clear, concise and relevant contributions to the meeting at appropriate times
15. seek to clarify issues and identify and assess possible solutions
16. acknowledge and discuss the contributions and viewpoints of others in a constructive manner
17. provide feedback to the person leading the meeting and other people attending to help improve the effectiveness of future meetings
18. give clear, accurate and concise information about the meeting, promptly to those who need it

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Manage information for volunteering activities

### Overview

This unit is about managing information. It involves: gathering and storing information; analysing information; using information to take decisions; and communicating information and knowledge.

### Performance Standards

#### Gather and store information

1. gather information using effective and efficient methods
2. prioritise and select the information that is relevant to you, or may be relevant in the future
3. verify, where possible, the accuracy of information you have collected
4. treat unverified information with caution
5. process information in line with organisational and legal requirements
6. store and organise information safely and in ways that will make it readily available and useable in the future
7. make effective use of technology in gathering, storing and disseminating information

#### Analyse information

8. identify objectives for your analysis
9. select information that is relevant to your analysis
10. select analytical methods that are reliable, effective and efficient
11. analyse the information with reference to your chosen objectives
12. identify findings, supported by evidence, and their implications for yourself and your organisation
13. share your analysis and its outcomes with others and take account of their feedback
14. store your analysis, evidence and findings



### Use information to take decisions

15. identify and analyse information that will help you to take decisions
16. obtain advice from reliable sources when information is unclear or insufficient
17. use information to develop a range of possible options
18. evaluate the strengths and weaknesses of each possible option
19. decide on the option that appears to be the most effective, given the information available
20. make sure the decision is compatible with your organisation's aims, objectives, values and policies
21. engage others in the decision-making process
22. take decisions in time for action to be taken
23. communicate your decisions clearly and effectively to those who need to know

### Communicate information and knowledge

24. identify the information and knowledge needs of the people you are communicating with
25. where necessary, carry out further research to collect information and knowledge that is not readily available
26. communicate the information and knowledge in a way that meets their needs, abilities and preferences of the people you are communicating with
27. make sure the information and knowledge is as accurate and reliable as possible
28. where information and knowledge may not be accurate and/or reliable, make this clear
29. check to ensure that the information and knowledge you have provided has been correctly understood

30. provide additional information and knowledge, clarification and rationale as needed
31. communicate information and knowledge in line with organisational and legal requirements
32. make effective use of technology when communicating information and knowledge

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## Report to external agencies about volunteering activities

### Overview

This unit is about reporting to external agencies. It involves: identifying and gathering information required by external agencies; and reporting to external agencies in line with requirements.

### Performance Standards

#### Identify and gather information required by external agencies

1. identify external agencies' information requirements, seeking clarification about any information requirements that you are unsure about
2. interpret and record the information requirements in ways that are meaningful to you and your organisation's project and work programmes
3. communicate the information requirements to relevant decision-makers and stakeholders
4. emphasise the importance of meeting these information requirements
5. ensure that decision-makers and stakeholders understand their roles and responsibilities for information gathering
6. work with decision-makers and stakeholders to establish systems that will enable the required information to be gathered
7. monitor the collection of information at regular intervals, and identify and respond appropriately to any problems
8. ensure that the information is available and accessible in the required format, when needed
9. observe requirements and agreements for data protection and confidentiality
10. make effective use of technology in gathering the required information

#### Report to external agencies in line with requirements

11. compile and analyse the information that has been gathered
12. work with decision-makers and stakeholders to clarify ambiguous information and fill any information gaps
13. summarise and present the information in a format that meets the requirements of the external agency
14. provide the required information to the external agency within agreed timescales



F11



15. respond effectively to any requests from the external agency for clarification or further information
16. seek feedback from the external agency and from decision-makers and stakeholders as to the effectiveness and efficiency of the information gathering and reporting process
17. evaluate feedback and identify and recommend ways in which the process could be improved

**To find out what knowledge and understanding you need to know for this unit please see the matrix in section 3**

**To find out what personal qualities are relevant to this unit please see the matrix in section 4**



## The Knowledge and Understanding Matrix

This matrix shows how the items in each of the five Knowledge and Understanding sections underpin competent performance in each unit of National Occupational Standards for Managing Volunteers.



## Personal Qualities matrix

This matrix shows how the behaviours within each of the 14 Personal Qualities underpin competent performance in each unit of National Occupational Standards for Managing Volunteers. (NB The Health and Safety unit E6 has not been included in this matrix as it has been imported from another standards setting body.)



## Investors in Volunteers matrix

This matrix shows how the Investing in Volunteers indicators relate to some of the units in the National Occupational Standards for the Management of Volunteers.



## Glossary

This glossary gives the meanings of some of the terms in the National Occupational Standards for Managing Volunteers.

The terms have been selected because they meet one or more of the following criteria:

they may be **unfamiliar** to some users (eg beneficiary, mitigate, stakeholder)

they are used with a **specific** meaning in the standards (eg competence, diversity, risk)

they may have **different meanings for users working in different contexts** (eg organisation, strategy)

there is a **risk of their being interpreted rather narrowly**; the glossary shows the full range of meanings for these terms (eg colleague, resources, structure, volunteer).

Other terms which are commonly used in management (eg vision, mission, goals, objectives, recruitment, placement, supervision, project, budget) have not been included in the glossary. Their meaning can be found in any English dictionary or Wikipedia.

This glossary is only for guidance, to avoid ambiguity and help users to understand the standards fully. It does not form part of the National Occupational Standards for Managing Volunteers and is not intended to be used as part of the assessment of candidates for National or Scottish Vocational Qualifications (N/SVQs).

### **advertising media**

Formal ways or channels (such as press, broadcast, leaflets, notice boards, websites etc) of communicating the opportunities available to potential volunteers. Advertising media may be paid for or free of charge. C2

### **beneficiary**

A person or organisation who benefits from the services provided. Examples of beneficiaries include: those receiving care and their families; those participating in sports, cultural or religious activities provided; members of communities benefitting from enhanced environments. A1, F2

### **colleague**

A generic term used to mean anyone you work with, regardless of: their hierarchical position in relation to you; whether they are paid or unpaid; whether they work in the same or another organisation. A3, D1, D4, E4

### **competence**

The ability to perform consistently in line with agreed standards. D3, D8, E1, E2, F1

### **criteria**

Statements or standards which can be used as the basis for making judgements. A5, C1, C3, F2, F3, F5

### **culture**

The set of shared attitudes, values, goals and practices which characterise an organisation. A2, D2

**diversity**

The inclusion of people with diverse characteristics. A3, A5, B1

**funds**

Financial resources in the broadest sense. Sources of funds are many and varied. Sources may either make funds generally available for the organisation's policies and plans or stipulate that funds are available for specific projects or programmes of work only. See also the National Occupational Standards for Fundraising which describe the performance expected of specialist fundraisers. F3

**induction**

The structured introduction of a person into a new organisation and/or role to enable them to perform effectively and safely. C4, C5

**mitigate**

Reduce the negative consequences of an event occurring. A2

**organisation**

This can be either: the organisation for which you work as a manager of volunteers, or the organisation in which you are placing volunteers (if your role is to recruit volunteers and place them in other organisations). A1-5, B1-2, C1-5, D1-3, D6-8, E1-5, F15, F7, F8, F10, F11

**partnership**

Collaborative work with other organisations. A partnership may be underpinned by a legal agreement or by a less formal mutual understanding of expectations. E5

**policy**

An approved approach designed to guide people's actions and decisions. A policy is often underpinned by more detailed procedures describing what should be done in specific circumstances. An organisation's volunteering policy describes, in broad terms, the organisation's approach to involving volunteers. A2, A5, B1, C1, C2, C4, C5, D1, D2, D7, D8, E3, F3, F6, F10

**procedure**

A description of what should be done in specific circumstances. A3, A5, B1, C5, D1, D2, D7, D8, E4

**project scope**

A project's scope clearly defines the boundaries of the project – what has to be achieved within the project and what does not. A project's scope may be defined on a number of dimensions, such as: deliverables (what products or services are to be delivered and what are not expected); target group (who the project is aimed at); geography (the territory the project covers); time (when it starts and when it finishes); resources that may be used. F2

**project sponsor**

A project sponsor is the person who wants the project carried out and to whom the project manager reports. A project sponsor may be an external client or a manager within your organisation. F2

**protocol**

An agreement between two or more parties on how they should work together in specific areas of activity. E5

### **resources**

A generic term covering anything which is used to support your work, including: physical (premises, equipment, consumables); energy; human (whether paid or unpaid, internal or external); information. A3, A4, C4, D1, D3, E1, E2, F1, F2, F4, F6-8

### **risk**

The chances of an event happening and the seriousness of the consequences of that event. "Risk" does not of itself have a negative connotation; there can be both positive and negative consequences of an event. Risk management is about assessing the risks, taking action to avoid events that have negative consequences and planning to minimise the negative consequences and maximise the opportunities if events do occur. A2, C1, C5, D1, D2, D4, E5, F2, F4, F6, F7, F8

### **specification**

A detailed description of requirements. A volunteer specification states what is realistically expected of a volunteer in a particular volunteering role and the knowledge, skills and personal qualities required. A3, C1

### **specialist**

A person with expertise in a particular area. A specialist may be someone inside or outside your organisation. C2, D4, D8, E4, F4, F8

### **staff**

Paid employees. A1, C1

### **stakeholder**

A person or organisation who has a legitimate interest in an organisation or issue. Stakeholders in volunteer-involving organisations may include: trustees or directors; employees; volunteers; partner organisations; beneficiaries; funders; subscribers; donors; members of the public; politicians; government bodies; regulatory bodies; media. A1-5, B1, E1-4, F1-3, F7, F11

### **strategy**

A planned way of achieving specific goals. An organisation's strategy is the planned way of achieving its overarching mission and objectives. A volunteering strategy is a planned way of effectively involving volunteers in the organisation's activities. A learning strategy is a planned way of helping people learn specific things. A1, A2, A4, A5, B1, C1, D5, E5

### **structure**

The arrangement of an organisation. An organisation may have a number of different structures, such as: managerial (who reports to whom); physical (who works where); relational (who communicates with whom). A3, A5, B1, E4

### **system**

A structured and organised way of doing things. An organisation may have a number of different systems, for such things as: communications systems; IT; work allocation; assuring quality. A3, A5, B1, D6, D7, E4, F8

**values**

The things that the organisation considers desirable and valuable. Making values explicit can help guide people's decisions and actions in an organisational context. A2, E1, E2, E5, F3, F6, F7, F8, F10

**volunteer**

Someone who provides their time free of charge to support the aims of your organisation, irrespective of any positive outcomes they may receive in return (including training, etc). The term includes people on unpaid placements, full-time volunteering schemes that may provide accommodation costs and basic living allowance, internships, voluntary workers and any similar models. A1-5, B1-2, C1-5, D1-8, E1-5, F2-11

**volunteering agreement**

A statement of the realistic expectations that the organisation and the volunteer have of each other in the volunteering relationship. C1

**volunteer specification**

A statement of what is realistically expected of a volunteer in a particular volunteering role and the knowledge, skills and personal qualities required. C1, C4

**The following terms are specific to the Health and Safety unit  
E6 Promote a health and safety culture in the workplace.**

**Control(s)**

The means by which the risks identified are eliminated or reduced to acceptable levels.

**Employer**

Wherever/whoever has responsibility for the workplace/work activity.

**Hazard\***

A hazard is something with the potential to cause harm (this can include articles, substances, plant or machines, methods of work, the working environment and other aspects of work management).

\* Definition taken from HSE *Management of health and safety at work – Approved Code of Practice & Guidance* Reference L21 (ISBN 07176-2488-9)

**Learner**

Any person in a workplace environment and undertaking learning, including those following a vocational or academic course.

**Legislation**

The Health and Safety at Work Act 1974 is the main piece of legislation under which nearly all the other regulations are made. It is for this reason that only this piece of legislation is specifically referred to in this Unit. There is an array of health and safety regulations and codes of practice which affect people at work. There are regulations for those who, for example, work with electricity, or work on construction projects, as well as regulations covering noise at work, manual handling, working with VDUs, or dealing with substances hazardous to health, etc. The specific requirements for all or any of these can be obtained from HSE local offices.

**Manager**

An individual charged with the responsibility for managing employees/ volunteers, and/or resources and processes.

### **Other people**

Refers to everyone covered by the Health and Safety at Work Act including: visitors, members of the public, colleagues, contractors, clients, customers, patients and students

### **Personal presentation**

This includes personal hygiene, use of personal protective equipment, clothing and accessories suitable to the particular workplace.

### **Risk\***

A risk is the likelihood of potential harm from that hazard being realised. The extent of the risk depends on:

- (i) the likelihood of that harm occurring;
- (ii) the potential severity of that harm, i.e. of any resultant injury or adverse health effect; and
- (iii) the population which might be affected by the hazard, i.e. the number of people who might be exposed.

\* Definition taken from HSE *Management of health and safety at work – Approved Code of Practice & Guidance* Reference L21 (ISBN 07176-2488-9)

### **Resources**

This includes: information, documentation, time, control measures, staff/people, equipment and support (including specialist assistance).

### **Responsible person/ people**

The person or people at work to whom any health, safety and welfare issues or hazards should be reported. This could be a supervisor, line manager, director or your employer.

### **Supervisor**

One who controls and or directs the work of others

### **Training Provider**

An organisation or individual (usually external) responsible for providing the training, work experience, and/or formal assessment for the learner.

### **Worker**

A person performing services for an employer under a contract of service, as a volunteer or an apprentice. Workers include; outworkers, those employed on a casual basis, in training and volunteers.

### **Workplace**

The single or multiple areas in which you carry out your work.

### **Working practices**

All activities, procedures, use of materials, substances or equipment and working techniques used in carrying out a work or job related task. This includes procedures for reporting hazards and unsafe working practices.

**Workplace instructions**

An organisation's instructions, method statements, safe systems of work, guidelines and processes on how to behave and perform tasks in the workplace. Within these national occupational standards "Workplace instructions" has been used to include:

**Policies**

A statement which directs the present and future decisions of an organisation. It is intended to influence and determine decisions, actions, and other matters.

Typically, a policy designates a required process or procedure within an organisation.

They are often initiated because of some external requirement.

**Procedures**

A series of steps following in a regular definite order that implements a policy

A series of steps or instructions, describing a way of doing things. A series of steps to be performed in a regular definite order under specified conditions.

Documented processes that are used when work affects more than one function or department of an organisation.

A series of clearly defined steps (and decisions) that explains or describes how one goes about completing a task.

This includes the documentation prepared by the employer about the procedures to be followed for health, safety and welfare matters.

This may be the employer's safety policy, general health and safety statements and written safety procedures covering aspects of the workplace that should be drawn to the attention of employees and that of everyone covered by the Health and Safety at Work etc. Act 1974 (visitors, members of the public, colleagues, contractors, clients, customers, patients, students).



## Useful contacts and training

### Training

Short courses in managing volunteers are run in local Volunteer Centres or other local agencies. The organisations listed below are among those that run courses covering the subject in greater depth.

#### **The Directory of Social Change**

Managing volunteers (short courses) [www.dsc.org.uk/training](http://www.dsc.org.uk/training)

#### **Excellence in volunteer management (EVM) Volunteering England**

A bespoke learning and development programme for all who work with volunteers [www.volunteering.org.uk/evm](http://www.volunteering.org.uk/evm)

#### **Community Service Volunteers**

Runs courses on managing volunteers and an annual residential course the Institute for Advanced Volunteer Management [www.csv.org.uk/training/volunteer-management](http://www.csv.org.uk/training/volunteer-management)

#### **Institute of Leadership and Management**

NVQs level 3, 4, and 5 in Management of Volunteers [www.i-l-m.com](http://www.i-l-m.com)

#### **LANTRA Awards**

Level 3 Award in Volunteer Management [www.lantra-awards.co.uk/training/volunteermanagement.aspx](http://www.lantra-awards.co.uk/training/volunteermanagement.aspx)

### Further help

#### **Local organisations**

**Volunteer Centres** First point of contact for all volunteer managers is their local Volunteer Centre or agency.

Volunteering England (VE) accredits and brands Volunteer Centres against six core functions. These are brokerage, marketing volunteering, developing good practice, developing volunteering opportunities, policy response and campaigning, and strategic development of volunteering. About one-third of volunteer centres are independent organisations and about two-thirds are part of other local infrastructure organisations, mostly Councils for Voluntary Service (CVSs) [www.volunteering.org.uk](http://www.volunteering.org.uk)

**Council for Voluntary Services (CVS)** CVSs provide help and assistance to their local voluntary and community groups. To find one in your area put 'Council for Voluntary Services' and the name of your area into an internet search engine.

#### **National volunteering organisations** **Volunteering England**

Regent's Wharf  
8 All Saints Street  
London N1 9RL  
0845 305 6979  
[volunteering@volunteeringengland.org](mailto:volunteering@volunteeringengland.org)  
[www.volunteering.org.uk](http://www.volunteering.org.uk)

**Volunteer Development Agency,**

Northern Ireland  
129 Ormeau Road  
Belfast BT7 1SH  
028 9023 6100  
info@volunteering-ni.org  
www.volunteering-ni.org

**Volunteer Development Scotland**

Jubilee House  
Forthside Way  
Stirling FK8 1QZ  
01786 479 593  
information@vds.org.uk  
www.vds.org.uk

**Wales Council for Voluntary Action**

Baltic House  
Mount Stuart Square  
Cardiff CF10 5FH  
0800 2888 329  
help@wcva.org.uk  
www.wcva.org.uk

**National infrastructure organisations**

**England**

Skills – Third Sector  
The Circle  
33 Rockingham Lane  
Sheffield S1 4FW  
www.skills-thirdsector.org.uk  
info@skills-thirdsector.org.uk  
0845 450 3860

**Scotland**

SCVO  
The Mansfield Traquair Centre  
15 Mansfield Place  
Edinburgh EH3 6BB  
0131 556 3882  
enquiries@scvo.org.uk  
www.scvo.org

**Wales**

WCVA  
Baltic House  
Mount Stuart Square  
Cardiff CF10 5FH  
029 2043 1700  
enquiries@wcva.org.uk  
www.wcva.org.uk

### **Northern Ireland**

NICVA  
61 Duncairn Gardens  
Belfast BT15 2GB  
028 9087 7777  
info@nicva.org  
www.nicva.org

### **Useful web sites are:**

**www.volunteernow.co.uk** - information on volunteer placements in Northern Ireland

**www.diycommitteeguide.org** - advice and resources for voluntary management committees in Northern Ireland.

### **Networks and professional associations**

#### **Association of Volunteer Managers (AVM)**

Peer-to-peer networking for people who manage volunteers info@volunteermanagers.org.uk www.volunteermanagers.org.uk

#### **UKVPM (UK Volunteer Programme Manager – Yahoo network group)**

UKVPM is a lively, friendly and participative networking and communication resource for all volunteer programme managers working in the UK  
<http://groups.yahoo.com/group/UKVPMs>

### **The Management Standards Consultancy**

13 Oriana Place London E14 8BQ  
020 7538 2153  
trevor.boutall@themsc.org  
www.themsc.org

### **UK Commission for Employment and Skills (UKCES)**

The UK CES can direct you to the individual Sector Skills Councils and other Standard Setting Bodies, through which you can access their suites of standards.

01709 765 444  
info@ukces.org.uk  
www.ukces.org.uk

## Further reading

### **Volunteers and the law**

Published by Volunteering England [www.volunteering.org.uk/resources/publications/volunteersandthelaw.htm](http://www.volunteering.org.uk/resources/publications/volunteersandthelaw.htm)

### **British Trust for Conservation Volunteers**

[www2.btcv.org.uk](http://www2.btcv.org.uk)

### **Community Service Volunteers**

A range of resources on volunteering at [www.csv.org.uk/resources](http://www.csv.org.uk/resources)

### **Volunteering England's good practice bank**

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

### **A free online handbook for volunteer managers that anyone can edit**

<http://wiki.volunteermanagers.org.uk>

### **Investing in Volunteers Award**

<http://iiv.investinginvolunteers.org.uk>

### **Investors in People**

[www.investorsinpeople.co.uk/](http://www.investorsinpeople.co.uk/)

### **PQASSO (Practical Quality Assurance System for Small Organisations)**

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

### **An online tool to help you source other national occupational standards that support the role of a manager**

[www.beabettermanager.com](http://www.beabettermanager.com)

### **An online tool to support third sector leaders and managers based on the national occupational standards for that area**

[www.thirdsectorperformer.com](http://www.thirdsectorperformer.com)



## **Skills – Third Sector**

The Circle  
33 Rockingham Lane  
Sheffield S1 4FW

[www.skills-thirdsector.org.uk](http://www.skills-thirdsector.org.uk)  
[info@skills-thirdsector.org.uk](mailto:info@skills-thirdsector.org.uk)  
0845 450 3860

Charity no: 1132476

If you would like to be kept up to date or are interested in finding out more about standards and how they can be used please email your contact details to [info@skills-thirdsector.org.uk](mailto:info@skills-thirdsector.org.uk) and we can add you to the mailing list.

The other standards Skills - Third Sector has developed are for Fundraising, Campaigners, Development Workers and Trustees and Management Committee Members.