



Community Transport Association

Promoting Excellence in Community Transport

Volunteers

A guide to recruiting, training & retaining volunteers
for rural Community Transport operators

The CTA Rural Good Practice Guide series
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Introduction

About this guide

The CTA is the national representative body for the community transport sector. It is the UK's biggest provider of training, advice and information on accessible, voluntary and community transport provision. It exists to support, advise, develop and represent not-for-profit transport operators, including voluntary organisations, local authorities and other public sector operators. It also seeks to promote high standards, best practice and progressive policies throughout the transport industry, which are derived from the experience of its members and constituency. The CTA provides information, advice, support and development services to hundreds of groups throughout the UK. These include transport operators, community associations, statutory agencies, local councils, voluntary organisations and individuals.

This Guide forms part of a set issued by the CTA as part of its Rural Transport Initiative in England, which is funded by the Countryside Agency.

Recruiting and retaining volunteers is a key issue for many CT Groups. This Guide is intended as an overview of the key issues which a CT group will have to take into account as part of this process. It discusses the policies, procedures and practices that must be considered in relation to volunteers and volunteering.

Volunteering - who, why & how?

A wide range of not-for-profit organisations in England depend on the “kindness of volunteers” to sustain their activities. Figures from the National Survey of Volunteering (1997) estimate that 48% of the population in the UK are involved in some sort of voluntary work.

So what is a volunteer? There is no legal definition - the term may be used to mean slightly different things by different people or sectors.

The National Centre for Volunteering, in a discussion of perceptions of volunteering, illustrates this very clearly - “...government schemes whereby people have to work for charities in return for benefits are sometimes described as ‘voluntary’ but many people would argue that since people taking part have to do the work they are not ‘volunteers’. Equally many people work unpaid in order to gain experience in very competitive areas like television but most people would not describe them as volunteers.”¹

The 1997 National Survey of Volunteering defines volunteering as “any activity which involves spending time, unpaid, doing something which aims to benefit someone (individuals or groups) other than or in addition to close relatives, or to benefit the environment”.²

Who volunteers?

The National Survey tells us that certain types of people are more likely to volunteer than others.

- People from the highest socio-economic groups were almost twice as likely to take part in a formal voluntary activity as those from the lowest.
- People in paid employment were more likely to volunteer than those outside the labour market.
- Both men and women were equally likely to volunteer.
- Volunteering reaches a peak in middle age, and tails off after retirement.

The survey also found “an increase in participation by those in the *third age* and a sharp decline in involvement by young people”.

¹ National Centre Volunteering - web site FAQs - www.volunteering.org.uk

² National Survey of Volunteering - Institute for Volunteering Research 1997

Why do people volunteer?

The old idea of volunteering relied heavily on the idea of “the kindness of strangers” and involved a distinct one-way traffic. People volunteered their time to help charity cases - the “poor”, “needy” or “deserving”; the most a volunteer was expected to gain was a vague warm feeling inside from having done something good. Of course, by doing good for others we also do good for ourselves; it makes us feel better. But nowadays, we recognise that the reasons people volunteer are more complex and diverse - it is recognised that the volunteer gets something out of the process too.

People’s reasons for volunteering are a mix of the altruistic and self-interested, including the meeting of one’s own needs and those of family and friends, responding to a need in the community, and learning new skills.

Your helpers and volunteers are a precious resource too important to assume that kindness alone is enough to sustain their commitment to your project.

If you are going to keep your existing volunteers, as well as find new ones, you will need to move away from seeing volunteering as a gift – a one-way process – and think of it as an exchange and a two way process - the volunteer providing the necessary time, skills and experience - the organisation fulfilling their expectations and needs; these are key points in attracting, motivating and retaining volunteers.

Why people don’t volunteer

As part of the National Survey, volunteers were asked about the drawbacks of volunteering. The main complaint was poor organisation; 71% said their volunteering could be better organised. Around a quarter of volunteers listed other criticisms:

- They were sometimes bored with tasks they were given
- They couldn’t always cope with the things they were asked to do
- Volunteering took up too much of their time
- Their organisation didn’t show any appreciation for their work
- They found themselves out-of-pocket.

What do volunteers do in CT schemes?

The main activity people associate CT volunteers with is driving; indeed, the National Survey of Volunteering found that over a quarter of volunteers were involved in “providing transport”.

Volunteer drivers at CT schemes can be found driving minibuses under Section 19 Permits or on registered routes under a Section 22 Permit. Schemes might also use volunteer drivers for smaller capacity vehicles, car schemes or furniture projects.

However, there are many other ways in which volunteers assist CT schemes; from running the service itself to answering the phone or cleaning vehicles. And don’t forget the vital one - serving on the Management Committee!

Volunteers in your CT scheme

Presumably, you are reading this leaflet because you wish either to attract new volunteers or to keep the volunteers you have. To achieve each, or both, of these aims, you will need to ensure that your organisation provides:

- a welcome to new volunteers, along with
- conditions that will encourage both them and your existing volunteers to stay.

A Volunteer Policy

Whether you are looking to recruit volunteers for the first time, or your CT already has a history of volunteer involvement, you need to be clear about:

- why your organisation wants to use volunteers, and
- what would be suitable work for them to do

If your CT is about to embrace volunteering, it is important to involve people at every level of your organisation in discussions about the above two issues – their understanding of and support for volunteering is vital. If you have been using volunteers for a while, and don't have a clear policy on the how and why of using volunteers, maybe now would be a good time to have similar discussions about these issues - *not forgetting to involve your volunteers!*

This is the starting point for developing a **Volunteer Policy**, which sets out the basic principles behind your volunteer-involvement, along with practical guidelines for working with volunteers. According to the National Centre for Volunteering,

“...a volunteer policy is the foundation on which your organisation's involvement of volunteers should be based. It forms the basis of your entire volunteer programme, giving cohesion and consistency to all the elements in your organisation that affect volunteers.”³

Whether you already have a volunteer policy, or are just starting out on recruiting volunteers, you need to make sure that it is a “live” document, in tune with the changing needs of your project, by setting up a process to review it regularly. If you do this, it will repay both you and your volunteers by being a clear reference point about every aspect of volunteer involvement. If you don't, it will simply gather dust on a shelf somewhere.

The National Volunteering Centre recommends that you:

“...may also want to use the policy as the basis of the information that you give to the people you work with about why you involve volunteers. Sometimes people can be worried about accessing services involving volunteers and can feel that volunteers are amateur or untrained. A good volunteer policy can help to show why and how your organisation chooses to involve volunteers in its service delivery.”⁴

³ Get it Right from the Start - National Centre for Volunteering website www.volunteering.org.uk

⁴ As above

What should be in a volunteer policy?

There are no hard and fast rules about what a Volunteer Policy should contain, and definitely nothing to say it has to be a desk-bending monolith! In fact, the weightier the tome, the more intimidating it seems and the less likely it is to be used. It is much better to have a short, concise document that refers to your other policies and procedures, such as Health & Safety, Equal Opportunities or Diversity.

The National Centre for Volunteering can help you with developing your Volunteer Policy, and are also able to comment on a policy you may have written yourself. See “Useful Addresses” for their contact details.

Make sure the policy is written in clear English, avoiding technical terms, jargon and acronyms. If it reads like a legal document, it will put people off and, as likely as not, get put (and stay) on the shelf.

Even though there is a common bond of transport provision, every local CT scheme will have different needs, which should be reflected in its Volunteer Policy (as well as in all its other policies and procedures). The policy of a scheme that runs mainly Dial-a-Ride type operations, for example will differ from that of a CT that focuses primarily on Group Transport.

However, there are some specific items, which should always be addressed in your Volunteer Policy unless you have a compelling reason not to do so:

- Mission Statement
- Statement of intent
- Recruitment
- Equal Opportunities & Diversity
- Induction
- Support & Supervision
- Expenses
- Insurance
- Health & Safety

These, along with others, are all examined more thoroughly in the following section.

Further information

The **National Centre for Volunteering** offers free help in writing or re-writing your volunteer policy. They will review policies and make practical suggestions on how they can be improved. They will look at existing documents as well as draft versions of new policies. To make use of this service:

Post your policy to the Information Service at the address in the “Contacts” section.

fax it to 020 7520 8910

Email it to mark.restall@thecentre.org.uk

When sending your policy please remember to:

- provide the full contact details for your organisation
- give any relevant background information (such as number of staff/volunteers) on your organisation and the reasons for your writing or re-writing the volunteer policy.

They will endeavour to review policies sent to them within three weeks of receipt; should they not be able to do this they will contact you on receipt.

Your Volunteer Policy & practicalities

This section covers the issues, as listed at the end of the previous section, you will need to include in your Volunteer Policy. Remember, the purpose of your Volunteer Policy is to describe and explain your scheme's working relationship with its volunteers for anyone who needs to understand it; it doesn't need to be a huge document, as it can link to your other policies and procedures, but it should be comprehensive.

Here, we will explain the above issues and examine some of them in more depth, looking at the practical implications for your scheme. If you can take all of this into account, you should be well on the way to achieving the happy situation of contented and fulfilled existing volunteers and a ready supply of new recruits!

Mission Statement

This is a short and concise statement of what your organisation does. Although you may not call it a "Mission Statement" (some people are put off by the name, seeing it as pseudo-business jargon) you should already have something that covers this in some form within your organisation.

An example might be: "Anytown Community Transport is a community-led organisation, which aims to provide safe, accessible and affordable transport for community groups and individuals in the town/city/borough of Anytown."

This explains to a potential volunteer, or anyone else who might read it, exactly who you are and what you are set up to do.

Statement of intent

Here, you can include an explanation of **why** and **how** the organisation wishes to involve volunteers. It sets clear parameters for the involvement of volunteers, and includes a statement of the principles to which you will adhere - for example, always ensuring that no volunteer should be out of pocket, or not using volunteers to replace paid staff.

After reading these preliminary sections, a potential volunteer, or anyone else who might read it, should have a clear idea of what the organisation does, why it involves volunteers in its work, and how those volunteers will be involved.

Recruitment

- Your policy should explain how you will recruit your volunteers. This explanation can be quite simple, referring to detail in your other policies and procedures.
- Your current recruitment process may be quite informal, but if your volunteers will be driving, or in contact with vulnerable people, you need to take extra care over recruitment and selection. In any case, it may be wise to consider the following questions:
- How will you make sure that the whole recruitment and selection process strikes the balance between not scaring off potential volunteers and ensuring that your CT gets the type of volunteers you need?

Some issues to consider (which are covered in more detail in the following pages) are:

- It may be useful to draw up a **Job Description**, or simple outline, of what each volunteering role involves. This makes clear to both parties what is expected, and can be used as a reference point for any future discussions about roles and responsibilities. You should be prepared, where appropriate, to re-negotiate and revise such outlines as part of ongoing supervision.
- Do you, or will you, use **application forms** for recruiting volunteers? If so, are they easy to use and understand? Do they contain jargon or technical language, or are they written in a way that may exclude people with poor written English?
- Will you ask for, and take up, **references** for potential volunteers? Will you use the same procedure as used for recruiting paid staff (if you have them)? Make sure that the process doesn't create unnecessary barriers for your volunteers - be prepared to explain why you need to do it and be flexible about who you will accept a reference from.
- How will you conduct **interviews**? Who will conduct them? What questions will you ask? What information will you give your interviewee about your scheme?
- How will you deal with people you feel are not right for your organisation or for the particular role in which they are interested?
- Do you need to screen volunteers by checks with the **Criminal Records Bureau**? (Essential if volunteers are working with vulnerable people).
- Do you need to make **health checks** when you recruit volunteers? You need to be sure that your drivers meet the health standards required by the Department for Transport and your vehicle insurers.

Practicality - Job Description & Person Specification

Isn't this a contradiction? Don't your volunteers choose you? Shouldn't all volunteers be valued for the time, energy and experience they bring with them?

Yes and no. CT schemes may need to be selective and target volunteers with different sets of skills. Drivers, for example, will need a combination of specific driving skills with the need for sensitivity and understanding. Other volunteers (to support your office and administrative functions or to become members of the management committee, for example) will need a different set of skills.

CT groups have a moral and legal **duty of care** to ensure the safety of their passengers, so some level of assessment and screening should take place prior to a volunteer becoming responsible for your passengers. A Job Description should set out clearly the responsibilities and duties of the task involved.

Building the profile

To ensure that both you and your volunteers understand what a job entails and what will be expected from the person doing it, it may be helpful to take a systematic approach to building up a job and volunteer profile. This approach can be broken into three stages:

- A detailed look at what is required - the **job analysis**
- What the work entails - the **job description**
- The skills, experience and values required - the **person specification**

1. Job Analysis

This is the process of examining a job systematically and in detail. Information for this analysis can come from a variety of sources:

- Other volunteers with similar responsibilities
- Other CT groups with similar positions
- CTA advice and contacts for other CT groups

There is no definitive method of undertaking a job analysis, however thinking about the following may help:

- **What, when, where, why & how** the task is to be done
- **Qualifications, skills and experience** required to undertake the task
- **Health standards** required (be careful not to exclude unnecessarily)
- **Attitudes and social skills**
- **Relationships** with passengers
- Relationships with other volunteers & paid staff
- **Responsible to** whom? - relationships with co-ordinator or supervisor
- General working environment

2. Job Description

From your job analysis, you should be able to build an accurate job description. The elements identified should be listed in order, so that the first duty is the most common or the major part of the job. Avoid jargon and unnecessarily flowery language; keep it as short and succinct as possible. If possible, check it with an existing volunteer.

3. Person Specification

Having worked out the nature of the job, the next stage is to identify the type of person best placed to do it. Commonly used headings that can help in this process are:

a) Values & attitudes

This is perhaps the most important item: a willingness to do the job and a basic sensitivity to the needs and aspirations of service users.

b) Experience, knowledge & skills

Some skills may be essential (e.g. basic driving competence for a volunteer driver). Experience in a similar setting is also an obvious advantage; an experienced book-keeper could make a good Treasurer, for example.

Beware of excluding potential volunteers who might be put off because they've never done it before. Make a point of saying that you can provide them with training.

c) Education & Training

Be careful not to over-specify. For example, you don't need GCSEs or O Levels to be good driver, but the CTA's MiDAS certificate from another organisation suggests a good candidate.

Once these key items have been addressed, you should distinguish between those that are essential to do the work and those that are desirable.

Keep the 'essentials' to a minimum to ensure they don't put off willing volunteers who are keen to develop their skills. Nevertheless, for volunteer minibuss drivers you will have to ensure they comply with the statutory requirements of driver licensing regulations as well as those of your vehicle insurers. (See also 'Insurance' and 'Driver Qualifications' below)

Practicality - Application Form

Once a potential volunteer has shown an interest, you will need to take a more formal approach to their application - including documentation.

When recruiting paid staff, application forms are used to filter out unsuitable applicants - interviewing every applicant would take up too much time. If you use an application form based on the one you use for paid staff, you are probably asking for more information than you need, or is appropriate. Application forms are useful to record basic information like name, address and essential driver data. It is not usually the best way of assessing a volunteer's suitability for a role; you will probably be able to get the information you need when you meet the volunteer in person.

For people without strong literacy and reading skills, or for people whose first language is not English, a form can be a barrier. You don't want to put off a potential volunteer, who may have exactly the skills you need, by presenting them with a maze of irrelevant questions. For example, while you do need to know a driver's motoring history and qualifications, you don't really need to know her/his educational qualifications.

Unless the job in question demands good standards of handwriting and literacy, you may wish to offer them alternatives - an application form in the local minority language (take advice on this), help in filling out the form or allowing them to complete it at home.

For drivers, the relevant details about driving licences, insurance, previous driving convictions, medical history, screening checks and references will have to be discussed and/or recorded. The use of an application form will speed this process and can be useful in recording information prior to an informal interview.

If you use a form, use plain language and don't ask unnecessary questions.

Practicality - the Interview

Keeping it Informal

Interviews shouldn't be like a visit to the Spanish Inquisition for potential volunteers! Remember that an interview with a volunteer is very different from an interview for a paid post - you should make this as clear as possible to potential volunteers.

A volunteer interview is a two way process, giving both parties an opportunity for to find out more and decide whether they are right for each other. Also, you will probably not be selecting from a number of people to fill one vacancy. If, however, it is a selection process for a limited number of roles, you should tell your interviewees at the start.

It is important to set a relaxed tone to ensure the volunteer - and the interview panel if there is one - do not feel intimidated or stressed. A successful interview should ensure the volunteer feels they have had the opportunity to learn how the job will work and show how they can fit into the set-up.

Why have an interview?

Having a member of staff talk informally to the potential volunteer is one way to check suitability and avoid later embarrassment. You may want to take the person to meet other volunteers, passengers or the vehicles that you use. This, along with the information available from the application form, references, qualification checks (driver licence, MiDAS certificates⁵) and background checks will help you build a picture of the person, why they want to help and how to ensure they reach their full potential.

CT groups, whose volunteers may be closely involved in the unsupervised transport of young children and other vulnerable passengers, may need to undertake further background or screening checks (See 'Practicality - Screening your Volunteers' below).

Is this enough? Some groups believe that the initial discussion, however successful, needs to be followed up by a more structured process involving at least one other member of staff or of the management committee.

It is good practice to check your impressions against somebody else's judgement. For the volunteer, it shows you're prepared to spend time and effort to get the best person for the job. Again, the tone should be informal, but it should, without putting the person off, put across the key requirements in terms of **commitment, duties** and **sensitivity** to passengers and other users, staff and other volunteers. However, short-handed you are, you cannot afford to bring people into your team who may have another, possibly harmful, agenda.

The interview itself

Prior to the interview, think about:

- Is there someone to look after the volunteer(s) – tea/coffee, expenses
- Are any special facilities required (ask them over the phone or in a letter)
- The room and seating arrangements
- Who will be on the interview panel (more than 2 or 3 people can be intimidating)
- Preparing copies of the application and a scoring sheet (if required)
- Who will introduce the panel and the job
- What questions to ask and who will ask them (these should relate solely to the qualities identified in the person specification)
- An agreed schedule with sufficient time (no more than 15 - 20 minutes, plus 5-10 minutes in between interviews)
- The method of notifying successful applicants
- The next stage in process (See 'Making your new volunteers welcome')

⁵ MiDAS – Minibus Driver Awareness Scheme. See 'Training' section.

When the volunteer arrives, make an effort to put them at their ease. The following should help to set a relaxed tone:

- A panel member should greet the volunteer and chat to them briefly before bringing them into the room. This will allow them to speak freely and may help “break the ice”.
- Smile when you meet the volunteer – remember they are doing you the favour.
- Introduce the people involved, say who they are and their role in the organisation.
- Explain how you will be proceeding and how long it will last.
- Indicate if you will be taking notes - it may put someone off if the panel suddenly starts to write furiously.
- Allow the volunteer time to settle – ask straightforward questions first. These could be any “closed” questions you have (see below).
- Make sure you give people the chance to ask any question(s) on their mind.
- At the end thank the person for coming and inform them if they have been accepted or how you will go about notifying them. Cover arrangements for payments of expenses (if applicable). Someone on the panel needs to accompany them on the way out, too.
- The person leading or chairing the panel should ensure timings are kept and the relevant items covered, without becoming sidetracked.

A correctly planned interview should encourage a two-way flow of information and should be a blend of:

- Organisational information – clarifying any final points
- Factual questions – dealing with driving experience/convictions. These are likely to be closed (yes/no) questions: “Have you had a conviction in the last 5 years?”
- Open ended questions – these allow the volunteer to express an opinion and show their attitudes: “How do you feel about driving a minibus?” “Tell me about any previous voluntary sector work.”

Avoid leading, trick or complex questions – keep it easy and simple.

References

Once you have selected your volunteer, you need to be as sure as possible that there is nothing about their background which makes them unsuitable. The first step is to get two references from people who have known the applicant personally or in previous employment. Do this in writing, and send a SAE, together with the job description and some background on the service you run. There are two important questions to ask the referee:

1. How long have you known X and in what capacity?
2. Bearing in mind the nature of the job, do you have any knowledge about him/her which suggests that s/he is unsuitable?

You could start the induction process before the replies come back, **but not contact with passengers or other vulnerable people**. If referees are slow in getting back to you, talk to the volunteer to find out what’s going on. Keep the records of references safely. They are nobody else’s business!

Practicality - Screening your Volunteers

“Screening” describe the practice of asking the police to check their records to see whether anyone applying for work with “at risk” passengers has committed any criminal offences that might make them unsuitable for such work. CT services can involve direct one-to-one contact with children or vulnerable adults. Besides your legal duty of care, you owe it to your passengers and everyone involved in the project to make sure the unthinkable doesn’t happen.

If your volunteers will be working with vulnerable people then they are exempt, under the Rehabilitation of Offenders Act, from not revealing past spent convictions. This means that you can ask whether an individual has any convictions on your application form, using wording such as:

“Because of the nature of the work you will be undertaking, you are required by the Rehabilitation of Offenders Act 1974 to declare all criminal convictions including those which are spent.”

The **Criminal Records Bureau (CRB)** (www.crb.gov.uk, Information Line 0870 909 0811) conducts these checks. The CRB is an executive agency of the Home Office, set up to help organisations make safer recruitment decisions. By providing wider access to criminal record information, the CRB aims to help employers in the public, private and voluntary sectors identify candidates who may be unsuitable for certain work, especially that involving contact with children or other vulnerable members of society.

The **Disclosure Service** (www.disclosure.gov.uk) enables organisations to make more thorough recruitment checks, particularly for positions that involve regular contact with children and vulnerable adults. It provides a regulated ‘one stop’ service for England and Wales offering access to records held by the police, together with those held by the Department of Health (DH) and the Department for Education and Skills (DfES).

The following information, explaining how the system works, is from the CRB Web Site:

“Disclosure

Disclosure can be used to describe both the core service and the range of products provided by the CRB. These products provide different levels of information about prospective job candidates or volunteers.

Three different levels of Disclosure

These different levels of Disclosure represent three levels of recruitment checking. Selecting the appropriate one depends on the position applied for and on the type of work involved. Some positions naturally require more in-depth and more confidential information about an applicant than other positions.

There are two higher levels of Disclosure (called Standard and Enhanced) aimed at protecting the vulnerable, or for particular positions of trust. Another level (called Basic) is for all other types of occupation.

How Disclosures are provided

All Disclosures are obtained via the one-stop shop of the CRB, which consolidates data and information from a number of different sources. The person to whom the Disclosure relates must always consent to the check being carried out.

In the case of **Standard and Enhanced Disclosures** the application form has to be signed by both the individual applicant and an organisation registered with the CRB - in most cases this will be the organisation that is recruiting. Once it has been processed by the CRB, separate copies are sent to both the individual applicant and the registered organisation.

Accessing CRB checks

To gain access to the above services, you will need to register with the CRB. This is likely to cost your organisation in the region of £300.

Registered organisations must also:

- satisfy the CRB that they are entitled to ask for the information under the Exceptions Order of the Rehabilitation of Offenders Act
- show that they have a code of practice vis a vis employing ex-offenders
- show that their confidentiality policy is clear about who will need to know information, how it will be stored, and when it will be destroyed.”⁶

For a small rural CT, the cost and conditions mean accessing CRB checks in the above way is clearly out of the question.

Basic Disclosures are applied for and issued exclusively to individuals. They do not involve the recruiting organisation.

How the Disclosure service is funded

It is intended that the entire new system should be self-financing. This extends from the establishment of the CRB to the payments made to the data partners and the on-going administration of the Disclosure service.”

Umbrella Bodies can spread the cost for their members by registering as a central provider, but they will need to ensure that their members adhere to the conditions imposed on the registered organisation.

The CTA is not currently an umbrella body for CRB checks.

The difficulties caused by the CRB's delays in providing information to organisations seeking CRB checks for staff or volunteers are well known. It is to be hoped that the present, extremely unsatisfactory, situation will be remedied.

If in doubt, talk to your local Social Services or Social Work team or contact the CTA advice service. Remember that, for anyone working with vulnerable adults and those under 18, the Rehabilitation of Offenders Act will **not** apply and any convictions should be disclosed and assessed. Remember also that a clear record will only tell you about convictions, not suitability.

⁶ From - National Centre for Volunteering website FAQs www.volunteering.org.uk

Practicality - Attracting volunteers

The process of attracting, developing and maximising the potential of volunteers is not a magic or mystical process. It is, however, one that needs to be appropriately managed, with consideration given to the various factors involved in understanding what motivates the volunteer to choose your organisation rather than another.

As we saw in “**Volunteering - who, why & how?**” people become involved in volunteering for a variety of reasons. You must recognise the mix of altruistic, semi-altruistic, social and personal reasons that motivates potential volunteers. *But remember, 37% of those asked in the National Survey said they would help if asked.*

Advertising

If your project already uses a lot of volunteers, you’ve probably found that word of mouth is one of the best ways of getting more; one cheerful fulfilled volunteer is likely to attract others. But volunteers that get a buzz out of working with older people may not be quite right for your new project working with young people or mums and toddlers.

Or you may be a small scheme, finding it difficult to attract volunteers. In either case, you need to “get the word out”. And that means some form of advertising.

There are a variety of methods available to get your message across. Before you begin, think about the target audience you want to reach and where they might go. If you’re looking for drivers who can cope with regularly lifting out and replacing seats in a minibus, for example, you might think twice about putting up posters at the University of the Third Age.

You could try: (this list is not exhaustive)

Printed adverts in the national (*the “Guardian” has a low-rate “volunteers” page one day a week*) & local press, community newsletters or specialist magazines such as *Community Transport* magazine.

Printed or duplicated posters, leaflets and flyers on notice boards in your local volunteer bureau, community centres, local shops, supermarkets, cafes, clubs, colleges, libraries, gyms, places of worship.

A Web Site - with comprehensive information about your scheme and possibly volunteer application forms.

Direct advertising on local radio.

News features in the local press or on local radio. Contact them and try to sell the idea of a feature on your scheme and your need for volunteers.

Giving talks to local community groups, colleges and businesses

The Art of Persuasion

So what should your advert contain? In general you should include:

- What your organisation or group does
- What the work entails
- How the volunteer can help
- What the volunteer has to do
- Where (and when) they can do it
- How to find out more (contact name)
- Closing date (if applicable)

In addition, you need to develop a persuasive message to incorporate in your advertising and publicity material. The following commonly used mnemonic - **AIDA** - may help you get started:

Stimulate an	Awareness	of the problem or need
Generate an	Interest	in how this problem can be solved
Create a	Desire	to solve it
Offer an	Action	to take to solve the problem

You also need to think about “selling” the benefits of volunteering by focusing on the elements that will “hook” your targeted audience. Keep your advertisements and recruiting materials short and punchy. If you’re looking for active live-wires as volunteers, you will want to make it feel like they’re joining a lively, dynamic organisation! If you’re targeting people who are not in paid work, emphasize how volunteering can enhance their CV.

Advertising can be expensive (especially in commercial newspapers). Think about ways in which you can get free publicity - could your appeal be part of a news story, for instance?

Informal newsletters and local networks may also be much more cost-effective - contact your local Council for Voluntary Service, Volunteer Bureau or Rural Community Council.

You should ensure that potential volunteers are not deterred by the fear of losing any benefits or allowances they currently receive. See “Expenses” later in the guide for more detail.

Equal Opportunities & Diversity

Volunteers are generally not covered by equal opportunities legislation, but in the interests of equity, it is good practice to include them in your **Equal Opportunities** or **Diversity Policy**. A good mix of volunteers (different ages, genders, cultures and social backgrounds) means your scheme will be more representative of the community it serves, and in turn more welcoming to additional volunteers from the whole community.

Your volunteer policy should therefore be linked to, and put your entire relationship with volunteers into the context of, your Equal Opportunities or Diversity Policy.

The National Centre for Volunteering offers the following sample diversity policy:

“Our organisation is firmly committed to diversity in all areas of its work. We believe that we have much to learn and profit from diverse cultures and perspectives, and that diversity will make our organisation more effective in meeting the needs of all our stakeholders.

We are committed to developing and maintaining an organisation in which differing ideas, abilities, backgrounds and needs are fostered and valued, and where those with diverse backgrounds and experiences are able to participate and contribute.

We will regularly evaluate and monitor our progress towards diversity.”⁷

Recruitment Materials & Diversity

Your recruitment procedure should aim to draw on as wide a pool of potential volunteers as possible. To ensure that you are in fact recruiting from as wide a potential range (gender, race, sexuality and ability, for example) as possible, you will need to ensure that your recruitment advertising materials:

- get to the range of people you intend to reach, and
- don't, through content or design, exclude people from particular sections of society.

If you're using photographs or other visual material, make sure they present a **positive image** of your organisation and volunteering in general. The National Centre for Volunteering has a library of free images which can save time and money on photography and illustration.

Think about **accessibility**. Do you need to translate your material into other languages? Your local Council for Voluntary Service or the Equality Unit of your local Council will be able to let you know about translation services.

What about **legibility** for partially sighted readers? The Royal National Institute for the Blind (RNIB) recommends non-serif typefaces like this one, without additional bars and ornamentation, rather than a **serif face like this**, which is harder to read. RNIB also recommends good contrast between text and background; black type on a yellow background provides better contrast than black text on a red background, for example. RNIB's "See It Right" range of booklets cover a range of aspects of accessible communication and design, including one about clear print. These are available by post from RNIB (see "Contacts" for address) or online from www.rnib.org.uk/seeitright/welcome.htm#3

Printed materials are not the only route to advertise your vacancies; tape, video or Braille might be more appropriate for some volunteers.

Keeping your Volunteers

Induction

Once a volunteer has met your entry requirements, and has agreed to become involved, you will need to make them feel they belong. Volunteers who are left to “get on with it” at this initial stage may feel lost, intimidated and frustrated and quickly become disillusioned and leave.

To overcome this a simple welcoming process should be undertaken to provide the appropriate knowledge and information. This can be done in various ways:

- An organisational information pack and personal letter from the organiser or committee
- Shadowing an established volunteer before “going it alone”
- Induction courses (if you have the time and resources)

As a minimum volunteers would need to know:

- Where to go and who to meet
- Who’s who in your organisation
- What they’re supposed to do, the training given and the expected standards
- The values and aims of your organisation
- General administrative arrangements – keys, claiming expenses etc.

Induction should be phased in to avoid information overload or undue stress. Some people may need more time than others. You also need to give the volunteer time to feel comfortable about what they are supposed to do. Keep checking back that they have understood. Appendix 3 gives a suggested time scale and items that could be covered.

Terms and Conditions

There is no requirement to provide a volunteer with a formal contract of employment as required for paid staff. In fact, you would probably wish to avoid anything that may create such a contract, as your organisation would then be bound by Minimum Wage legislation.

According to the National Centre for Volunteering, there can be problems if “...there is found to be a contract between the organisation and the volunteer. There does not have to be a written document, or even a verbal agreement for the relationship to be seen as contractual. In simple terms what a National Minimum Wage inspector will be looking for is whether the volunteer is receiving something of value (in legal language ‘consideration’) in return for the tasks they are performing for the organisation.

The actual value of the consideration can be very minimal. If a volunteer receives £5 a day flat rate expenses, and spends £4.50 on food and travel, the ‘extra’ 50p will be seen as consideration. Even non-monetary perks will fall into this category; *for example, any training not directly related to the work the volunteers are doing...*⁸ (our italics)

See “Training” below for what to do to avoid the above situation.

Organisations, however, should have formal guidelines, or a code of practice, to explain what the organisation expects of its volunteers and what a volunteer can expect in return. This is one of the purposes of your volunteer policy.

⁷ “Get it Right from the Start” - National Centre for Volunteering 2003

⁸ From - National Centre for Volunteering website FAQs www.volunteering.org.uk

Support & Supervision

All volunteers need support. The kind of support you provide will depend on the nature of their work and their needs. Key elements of support can include:

- **Training** – everyone must be given sufficient training to do their work well
- **Motivation & recognition** – meaningful ways to recognise the contribution volunteers make.
- **Supervision** – regular time to talk and plan

Training

Training will have a positive effect on attracting, motivating and keeping your volunteers. Not only will it help create a safe working environment, fulfilling your obligations under your 'duty of care', it will also give your volunteers the required skills, knowledge and confidence to carry out their work competently and to the best of their ability.

It is important to ensure that any training provided should be appropriate and designed to encourage volunteering. The prospective - or even experienced - volunteer who feels that regular training is unnecessary is a volunteer to be worried about!

Be aware of the risk of creating a contract of employment (noted in "Terms and Conditions" above) by giving training to volunteers that is in no way relevant to their role, in return for work they have done for you. As this could be construed as a "consideration" under the National Minimum Wage Act; you could therefore be deemed to have created a by paying a volunteer, albeit in kind, for work done. You would then be liable to pay that person at national minimum wage rates.

To avoid this, the National Centre for Volunteering advises: "As training must be necessary for the volunteer role to not count as a consideration it is important to make sure that any training is open to all volunteers and that being eligible for training is not reliant on them having volunteered for a set period of time."⁹

Training for Drivers

For drivers it is acknowledged that appropriate training will:

- give your passengers the comfort & knowledge that they are in safe competent hands
- reduce the risk of accidents by enhancing on-road skills, anticipation and awareness
- by training in the use of specialist equipment, improve passenger safety,
- result in lower running and maintenance costs

There many levels on which your training will have to take place. These are some of the things to think about (again with volunteer minibus crew in mind):

(Essential)

- How to do the daily check and report faults
- Familiarisation with the vehicle systems and controls
- An on-road accompanied drive with an experienced driver
- Use of specialist equipment (lifts, ramps, wheelchair tiedowns)
- Use of seat belts and restraint systems
- Basic lifting, moving and handling procedures
- Assisting passengers

(Desirable)

- Emergency evacuation procedures
- First Aid

⁹From - National Centre for Volunteering website FAQs www.volunteering.org.uk

This looks a daunting list, and you should certainly take it slowly with less experienced or confident volunteers. The good news is that many of these requirements have been bundled up into off-the-shelf packages by the CTA. Yes, there will be costs, but you should make your funders understand that training is a core cost of volunteer effort. Indeed, volunteer turnover is always likely to be higher than for paid staff.

The CTA "cascade" training packages

MiDAS stands for the **Minibus Driver Awareness Scheme**. It has been developed by Hampshire County Council, and licensed by the CTA to establish a single UK wide standard for the assessment and training of minibus drivers. MiDAS, using a common syllabus, will assess your drivers to ensure their driving skills are of high standard and provide training on legal, safety and disability issues and on specialist equipment. Over 50,000 drivers have already been trained to the MiDAS standard.

Motivation

Recognition. This can be informal or formal, based on your own style or sophisticated management systems and practices. What matters is your acknowledging the volunteer's efforts and value. For example:

- A simple "thank you" for a difficult job well done
- An award for 1, 3 and 5 years' accident-free driving
- 1000 accident-free miles
- 1000th passenger award (either for that driver - or for the whole team)
- Completing a MiDAS or PATS course - there's a certificate
- Pass round letters of user satisfaction, cuttings from the press or good news from funders

MiDAS operates on a "cascade" approach to training, based on a UK-wide network of locally-based Driver Assessor/Trainers (DATs), trained by a small number of experienced Training Agents. Organisations using volunteers can choose between having their own DAT trained or paying for the services of someone in another CT group. If you are likely to train more than 8 to 10 drivers, it may well be more cost-effective to have your own DAT - and you may be able to earn a little by passing on MiDAS to other organisations in your area.

The CTA is the UK's largest supplier of specialised training for CT schemes, delivered through national, regional and, on demand, local training events. comprehensive range of CT and management training courses are available from the CTA to assist in the personal development of your volunteer drivers, passenger assistants and co-ordinating staff. Further details are contained in the Appendix, under "Training".

Responsibility. Give your volunteers the opportunity to take an active role in your organisation by:

- Talking to them about service problems and issues
- Involving the volunteer in the decision making process
- Ask them to help in bringing the latest volunteer into the team
- Becoming road safety or health & safety representative
- Attending the management committee

Development. Provide opportunities to learn new skills, enhance status and fulfil goals.

Supervision & disciplinary procedures

Generally speaking volunteers are not covered by employment legislation and therefore cannot take organisations to tribunal for unfair dismissal. This does not mean, however, that getting to the stage where you have to discipline, or dismiss, a volunteer does not have repercussions for both your scheme and the volunteer concerned. Volunteers who feel they have been treated poorly will tell people, and the word-of-mouth this generates can damage your volunteer programme and the organisation itself.

You owe it to your volunteers to help them get the best out themselves and their time with your scheme; you also want to ensure that your scheme operates effectively and that small problems can be dealt with before they grow into major ones. In both practical and moral terms, therefore, it is vital to have adequate supervision and regular supervision meetings, set out in the framework of a Disciplinary Procedure. If you are reading this and do not have a Disciplinary Procedure, the information service of the National Centre for Volunteering can provide information on drawing up such policies. As Mark Restall, an Information Officer at the National Centre for Volunteering says:

“...a volunteer can't be expected to improve or change the way they work if an issue hasn't been brought to their attention. Perhaps the volunteer needs a change of role. They may be bored in their current one, or feel underused.

Are there any other suitable positions in the organisation?... this is a problem that can be spotted earlier through adequate supervision. Communication is a vital part of volunteer management.

If a volunteer is not suited to the role they are assigned to - or any others at your organisation, remember that they may have much to offer a different organisation. Make sure that they are aware of this, and refer them to their local volunteer bureau and any other organisations that you feel may be able to make use of their skills. Having a trial period for your volunteers allows you to see whether or not they are suitable, as well as giving the volunteer a chance to get a taste of the role.”¹⁰

Hopefully, you will never reach the stage of having to discipline or dismiss a volunteer. But, if you do, you will be very glad that you took the time to develop clear disciplinary procedures

Legal & other issues

Disclaimer - while every effort has been made to ensure that information contained in this guide is correct, it should not be regarded as a definitive statement, or interpretation, of the law. Readers should satisfy themselves, by taking appropriate advice if necessary, of the legality and probity of all aspects of their CT operations.

¹⁰ “Volunteering” - November 2001 The National Centre for Volunteering

Practicality - Benefits & Expenses

Being in receipt of benefit need not be a barrier to working in the CT sector. As long as organisations follow a few simple rules their volunteer should not be penalised nor lose their current levels of benefits, income support or tax relief.

Expenses payments

It is good practice for organisations to reimburse genuine out-of-pocket expenses incurred by their volunteers. As long as the sums reimbursed do not exceed the amount spent, it will not count as income and the volunteer will not be taxed on it. For National Insurance purposes volunteer driving is *not* classed as gainful employment, and therefore there is no requirement for NI contributions. Genuine out-of-pocket expenses include:

- Travel to and from place of work
- Meals bought when volunteering (this may be subject to a minimum time limit – e.g. only paid if away for over 4 hours)
- Travel (and even accommodation) in the course of volunteering
- Care of dependants when volunteering
- Cost of protective clothing
- Postage, phone calls, stationery directly related to voluntary work.

Excess expenses payments - a warning

It is important that you do not pay more than the actual cost incurred, as this will leave the volunteer liable for tax and may undermine their eligibility for any benefits they receive. Such a payment could also be regarded as a “consideration”, and may therefore create a contract of employment between your scheme and the volunteer, with the same repercussions as listed in “**Training**” above.

To avoid problems, for both your scheme and for your volunteers, caused by there being a surplus of payment over expenses incurred (as discussed in “Terms and Conditions” above), organisations should specify upper payment limits on meals and dependant care costs and keep a record of all expense payments. The golden rule is to protect your volunteers by *only paying out against receipts*, except for minor items such as telephone calls.

The National Centre for Volunteering has a free form, agreed with the DSS, to enable people on benefits to record out-of-pocket expenses.

Volunteering and benefits: what is allowed?

Definition of voluntary work

All benefits rulings agree that voluntary work is work for a not-for-profit organisation, or work for someone who is not a member of your family, where only reasonable expenses are paid.

The last thing you as a volunteer manager, or your volunteers themselves, want is for them to have money stopped from their benefit cheque. Regrettably, this has happened in the CT sector, although in most cases, claimants have been vindicated on appeal. The CTA would welcome information on any such cases in order to take them up with national government agencies.

Make sure you ask at the interview stage if your potential volunteer is on benefit, and, if necessary, advise them to seek the advice of the local CAB or volunteer bureau on whether their money will be affected. To do this properly, you will need to sketch out what the duties are and what your arrangements for payments are. This is where a clear Job Description and Volunteer Policy will come in very handy.

There is a lot of confusion over whether volunteering affects an individual’s benefits. This is not helped by the fact that many benefits advisers are poorly informed about volunteering and often give people the wrong advice. In actual fact the rules are quite simple, and its well worth knowing them so that you can advise volunteers if they have any queries.

Let's take a look at the implications of volunteering for a number of benefits:

Job Seekers Allowance The current regulations allow as much voluntary work as is liked as long as:

- the volunteer is available and actively seeking work as agreed with their Employment Service Adviser.
- they can be contacted quickly and are able to start work, or attend an interview, within 48 hours.
- they do not receive any payments other than genuine expenses.
- it is reasonable for the organisation not to pay the volunteer for doing the voluntary work

Volunteers **must** tell the Jobcentre if they are doing, or intend to carry out, any voluntary work, including any payments, in cash or in kind (e.g. meal vouchers), that they expect to receive. Failure to disclose this may affect their Job Seekers Allowance and undermine the reputation of the voluntary organisation.

To help simplify matters there is an Employment Service Form that volunteers should complete: *ES 672V: Providing a service or doing voluntary work when you are unemployed*. This form, which is quite straightforward, asks you as a volunteer to describe briefly:

- the type of voluntary work you hope to do
- who you are doing it for
- any expenses you may receive, and
- the necessary contact details should you be required for a job interview.

Scheme supervisors should take time to explain to their volunteers that it really is in everybody's interests to ensure that this form is completed, and that it should not be overlooked by the volunteer or the Jobcentre.

It may be beneficial, to the volunteer and the Jobcentre, if you produce a letter explaining the volunteer's conditions of work, expenses, the benefits of volunteering (new skills, more

experience) and that the organisation understands the volunteer is actively seeking work. Emphasise that if a vacancy comes up when the volunteer is with you, the Jobcentre can ring you and you will be able to contact the volunteer within, say, 2 hours.

Income Support. Volunteers may do as much voluntary work as they like. Income Support will not be affected as long as only genuine expenses are claimed.

Disabled Person's Tax Credit. Voluntary work does not count towards the 16 hours limit.

Disability Living Allowance. DLA is an allowance paid in acknowledgement of the fact that life for someone with a disability may be more expensive – for instance, someone with mobility problems may be reliant on taxis. Volunteering will not affect whether an individual receives this benefit or not.

Council Tax & Housing Benefit. Volunteers must tell their local council about any kind of payment (cash or in kind) they receive including voluntary work. Some payments, however, may be excluded. Levels of benefit should not be affected.

Incapacity Benefit & Severe Disablement Allowance. There is a lot of confusion over Incapacity Benefit because there used to be a rule that individuals in receipt of the benefit could only volunteer for 16 hours a week. This rule no longer applies, although many people are still being told that it does.

There is now no limit on the number of hours a volunteer may work. The local Benefit Agency or DSS Office should, however, be contacted before the start of any voluntary work for confirmation that this is acceptable. In a few cases, disablement benefits have been lost when the DSS have deemed that the work is proof that the disability is bogus. If in doubt, talk it over with the CAB. The voluntary work must also not be for a close relative.

Further Information - benefits

Volunteer expenses and tax - A free three-page information sheet from The National Centre for Volunteering. (Also available on the NCV web site).

Providing a service or doing voluntary work when you are unemployed – Employment Service Leaflet ES 672 V

Volunteer Drivers Inland Revenue leaflet IR 122

Financial help if you are working or doing voluntary work. Benefits Agency leaflet WK4. Contains information about voluntary work and:

- Working Families' Tax Credit
- Disabled Person's Tax Credit
- Jobseeker's Allowance (JSA)
- Income Support
- Housing Benefit
- Council Tax Benefit
- How voluntary work affects benefits
- How therapeutic work affects benefits

This leaflet is currently being reprinted but is available on the DSS website at:

www.dss.gov.uk/publications/2000/index.htm

Jobseeker's Allowance. Employment Service leaflet JSAL7 (Rev). Voluntary work when you're unemployed and it needn't affect your benefits! This leaflet is currently being reprinted.

If you need further information or want to talk through an individual case you can contact the National Centre for Volunteering Information Team on: 0800 028 3304 (*freephone and textphone open Mon-Fri 10:30-12:30 & 2-4*) or e-mail information@thecentre.org.uk

Community Car Scheme Drivers and Expenses

For volunteer drivers on community car schemes, the implications of paying in excess of expenses are particularly severe. The usual system is based on a mileage allowance for any journeys they undertake. Schemes must ensure that the rates given by the Inland Revenue are not exceeded. If they are, your driver has then made a profit and this will affect their insurance, which allows them to be paid expenses on a "strictly non-profit basis". It could also mean they are operating as an unlicensed private hire vehicle. If this happens it will undermine the whole legal basis of your car scheme operation and leave both the scheme and the driver open to prosecution.

The tax-free approved mileage allowance payments for 2002/2003 are:

Cars and vans, up to 10,000 business miles

40p per mile (regardless of engine size)

Cars and vans, additional business miles

25p per mile

Motorcycles

24p per mile

Bicycles

20p per mile.

These rates reflect the cost of depreciation, insurance, road tax, fuel, servicing and repairs and are set by the Inland Revenue.

For further information:
CTA Advice Services

Community Car Schemes - CTA Publication

Volunteer Drivers - Inland Revenue leaflet IR 122

Minibus Drivers and Expenses

Drivers who pass their car driving test from January 1997 onwards can only drive a minibus under certain conditions. One of these conditions is that drivers should *receive no payment or consideration other than genuine out of pocket expenses*. Reimbursement in excess of actual expenses would constitute a payment, meaning your driver would be driving your vehicle without the appropriate licence and more than likely without insurance, as this is usually dependent on the driver holding a current, valid licence for the type of vehicle being driven. Both the driver and the operator could therefore face prosecution under current licensing and insurance regulations.

CT groups who run a community bus under Section 22 Community Bus permits are also governed by the need for their drivers to be a non-paid volunteer *no matter when they passed their test*. It is important therefore that you do not pay more than the actual expenses incurred (see “Excess expenses payments - a warning” above).

For further information:

CTA Advice Services

Driving Licensing for Minibuses - *CTA leaflet*

Community Buses - *CTA Publication*

Minibus management - *CTA Publication*

Driving a Minibus *INF 28 – DVLA*

Information Sheet

Practicality - Insurance

CT schemes have both a legal and moral responsibility to ensure they have adequate insurance cover. Volunteers face the same risks - to their passengers and themselves - as paid staff, and, therefore, there should be no differentiation. It also reinforces the message that the volunteer is valued, which should be a positive factor in attracting and retaining them.

As an organisation you require two types of insurance:

- When you use a vehicle on a road
- When you are an employer

Motor Insurance - Legal requirements

The minimum vehicle insurance required by law is what is termed 3rd party only. This covers the driver against claims made against them in respect of injury to any person on or near the vehicle or damage to property (including domestic animals) arising out of the use of the vehicle on a road. It does not provide cover against fire, theft or damage that cannot be attributed to anyone else.

It is common practice, for minibus operators and community car schemes that operate “pooled” vehicles, to have fully comprehensive insurance, as this will give both you and your drivers the comfort and assurance that they will not be faced with a prohibitively costly repair bill. (*Note, however, that if you claim for relatively minor damage, your premium is likely to rise sharply in the following year*). Minibus operators should check to see if they have an upper or lower age limit imposed on them by their insurers (e.g. 25 – 70). It is worth noting that some insurers will give a 10% reduction in premiums if you are a member of the CTA’s MiDAS scheme.

Motor Insurance: Community Car Scheme drivers

Drivers who become involved in community car schemes usually provide their own insured vehicles. They should notify their insurers of their involvement making it clear that any “*expenses will be claimed strictly on a non-profit basis*”. Insurers should accept this as being acceptable and within the driver’s current policy and should not increase or load premiums. A standard letter, approved by Association of British Insurers, is available from the CTA’s advice service to minimise any difficulties. The Inland Revenue set annual limits on the allowances per mile a driver may receive without being ‘in profit’. For an explanation of these rates and the consequences if they are exceeded, see ‘Community Car Scheme Drivers and Expenses’ in “Expenses” above.

Some schemes require their drivers to have fully comprehensive insurance. There is, however, no direct advantage to the passenger from this. Comprehensive policies tend to apply to newer cars with a high capital value. Schemes stipulating comprehensive insurance may find that volunteers with perfectly adequate and safe older vehicles may be excluded from helping. These issues are discussed in detail in the CTA’s book, *Community Car Schemes*.

Non-Motor Insurance

Employer’s Liability. The Employers Liability Act 1969 requires all organisations to be insured against any accidents or disease sustained by their *paid* staff during the normal course of their employment. It is good practice to extend this protection to your unpaid volunteers, because in certain circumstances your volunteers could be seen in law as *bona fide* employees.

Public Liability. This covers your drivers and passenger assistants if a member of the public suffers any injury, damage or loss, due to negligence, whilst your volunteers are working away from the vehicle. (Groups should consider having guidelines detailing what is an acceptable level of assistance whilst away from the vehicle.) It is considered nowadays that an adequate level of cover would extend to £5,000,000. Both minibus and car schemes must be covered.

Personal Accident. This provides compensation if death, loss of limb, sight or permanent disablement occurs as a result of an accident whilst at work.

Personal Liability. This protects members of your organisation should they be held personally liable for an incident or accident. This would be beneficial for unincorporated groups who may have problems in attracting committee members because of concerns of personal risk. (The CTA strongly recommends incorporation in order to reduce management committee liabilities; for further information on the options, contact the CTA advice services.)

Loss of no claims bonus & payment of excess. This provides cash compensation for community car scheme drivers if, whilst driving on behalf of the scheme, they lose their “No claims” bonus or have to bear the cost of any initial excess payment.

Further information:

CTA Advice Service
Minibus Management - *CTA publication*
Community Car Schemes - *CTA publication*
Volunteer Drivers - *Inland Revenue leaflet IR 122*

Health & Safety (H&S)

Travel is never without risk. There may even be mistaken views that minibuses are dangerous vehicles. They're not. A passenger in a car is far more likely to be involved in a serious accident. There is, however, always the potential for an accident and, although we can never completely remove the risk factor when transporting passengers, much can be done to recognise and minimise the dangers. The key to avoiding problems is a comprehensive approach to training, as discussed in the relevant section. But there are other things to consider.

Duty of Care

"The duty of care is a general legal duty on all individuals and organisations to avoid carelessly causing injury to persons. It has been developed by the courts over many years. The duty is regardless of the size of the organisation, its income or whether the organisation has paid staff."¹¹

All voluntary and not-for-profit organisations have a "duty of care", under the Health and Safety at Work Act, to identify risk areas and procedures and have a programme to deal with these. The Health and Safety at Work Act affects all of us. It is considered good practice by the Health & Safety Executive (HSE) to apply the same standards to voluntary workers as to paid staff under your "duty of care".

You must do all that is reasonably practicable to ensure the health and safety of those affected by your work activities or using your services. What's safe for your volunteers is going to be safe for your passengers. Health and Safety is essentially an issue of communication and common sense. There are some procedures, which will only work if they involve all of your volunteers, especially those at the "sharp end".

Organisations should:

- Develop an Health & Safety Policy
- Undertake risk assessments of any hazard in the work tasks (e.g. getting in and out of the vehicle on a passenger lift, manual handling of passengers)
- Set up safe working systems and emergency procedures, based on risk assessments (what would you do if the vehicle caught fire?)
- Implement an accident reporting system - and follow up any incidents
- Review these systems & procedures on a regular basis
- Many H & S manuals have little to say about risk assessments in relation to transport, perhaps because the HSE has no formal responsibility for transport. Don't let this stop you. Assess your whole operation, including what goes on out on the road.

Volunteers and Duty of Care

Volunteers must take care of their own and others' health and safety, co-operate with all organisational and H & S measures that are in place and be able to report any concerns they may have. Volunteers should be given:

- adequate training for the work they undertake
- a safe and healthy working environment
- adequate information and instruction
- adequate supervision
- safe work equipment

¹¹ "Health & Safety of Volunteers" - National Centre for Volunteering website www.volunteering.org.uk

Risk Assessment

This is not complicated, and the HSE issues a simple 5-step guide to risk assessment. It is about recognising and doing all that is reasonably practicable to remove, reducing or remedy the potential for an accident, injury or ill health. Risk assessment need not be difficult or complicated and can be undertaken quite easily at a local level. Remember that this is one way of involving your volunteers: they're far more likely to know what's dangerous on the vehicle than someone sitting in an office!

There are five main steps to this process:

- Look for the hazards
- Decide who might be harmed
- Evaluate the risk – are existing precautions enough?
- Record your findings
- Review your assessment from time to time

Further information on how to undertake basic risk assessments is given in the CTA's book, *Minibus Management* and the HSE's *5 Steps to Risk Assessment* booklet.

Drivers Hours & Record Keeping

Groups must ensure that they are aware of any ongoing work or other commitments that volunteer drivers may have that would affect their ability to drive safely. Volunteers should not be expected to drive for a significant length of time after a full day's work or during their normal hours of sleep.

On longer journeys, for passenger comfort and safety, adequate rest periods of 15 minutes or more after two hours of driving should be included and where possible use made of a second driver. Drivers should not drive, or be expected to drive, when they are feeling tired or unwell, or are on any medication that may affect their driving.

Volunteer Minibus Drivers will not be covered in the UK by domestic or EU Drivers' Hours Regulations, nor do they have to keep a record of their time spent driving. The exception to this is that, if a volunteer also drives a goods vehicle or PSV, a record of voluntary driving hours must be kept.

Generally it is not good policy to expect Volunteer Drivers to do as much as is set out in Drivers' Hours Regulations. What *is* good practice, however, is to regard The Driver's Hours rules requirements as an absolute minimum standard to abide by, especially on longer journeys. So you should *never* expect a volunteer to do more than 10 hours driving, or a total working day of 16 hours. Have particular regard for those who have another job or caring responsibilities.

Car Scheme Drivers No legislation governs private motoring – only the general requirement in the Highway Code (Rules 80 & 212) that cars should be well ventilated and that the drivers should rest if feeling sleepy or drowsy. Once again, take care not to place car drivers under stress - or you'll lose them fast!

Further information:

CTA Advice Services
Minibus Management - *CTA Publication*
Community Car Schemes - *CTA Publication*
Various HSE publications

Driver Licensing

UK minibus driving regulations

CT operators must check that their volunteer drivers have an appropriate current licence. They must also be aware of the important licence changes that took place in 1997. These changes, designed to harmonise the rules governing licensing across the EU, mean that you will come across some newer drivers whose entitlement to drive a minibus is limited. The key issue is whether the driver passed his or her car-driving test: **before** or **after** January 1st 1997.

There are legal dangers for both your organisation and the driver if you are not aware of these differences.

Drivers who passed their test before 1997

automatically received a D1 (restriction 1 or 101) minibus category. These drivers may

- drive any size and weight of minibus, tow trailers and may be paid under existing Section 19 (10B in Northern Ireland) Small Bus Permit regulations.
- drive any size and weight of minibus under existing Section 22 Small Bus Permit regulations (but not in Northern Ireland).
Remember, however, that drivers of vehicles operated under a Section 22 Small Bus Permit may not be paid.

Usually drivers will keep this D1 (restricted) category on their licence until age 70, when licences have to be renewed or before age 70, if they have to renew their licence on medical grounds. Drivers may continue to drive a minibus after age 70 but must make a special application when renewing their licence and meet the required medical standards. CT coordinators should also check if there are any upper age limits on their minibus insurance (see previous section).

Just to complicate matters, people who have not had a new licence since 1991 may still have an old style licence which only lists categories A and E. Category A includes the D1 (restricted) entitlement.

Drivers who have passed their test since January 1st 1997

no longer have an automatic entitlement to drive a minibus. However, under certain conditions new drivers *are allowed* to drive a minibus. These conditions are fully explained in the DVLA Information sheet: *Driving a Minibus*. The salient points that concern minibus operators are:

- They must have held full B (car) entitlement for 2 years.
- The driver may **not** receive any payment or consideration (*remembering the broad definition of consideration cited in "Terms & Conditions"*) other than genuine out of pocket expenses.
- There is a weight limit on the minibuses they can drive (3.5t or up to 4.25t, if wheelchair accessible)
- They cannot tow trailers

It is important to take these differences in licence into consideration when looking at your job and personal specifications (see 'Building the Profile'). If a driver who gained their licence after 1996 applies to help, you must ensure:

- They meet **all** the conditions laid down under the current regulations
- Your minibus insurers do not specify any extra conditions

Car Scheme Drivers

The licence changes that occurred in 1997 have no effect on car drivers. No special driving licence is required to drive for a voluntary car scheme and as long as the volunteer's licence is current and valid and fulfils any special conditions required by the scheme (e.g. no endorsements), it should be acceptable.

Volunteers from Abroad

The regulations governing volunteer drivers from *outside* the EU who become resident or a visitors to the UK are quite complex. Volunteer organisers are strongly advised to contact the CTA's advice services.

Style of Licences

New driving licences now have a photograph of the driver on them. These Photocard licences must be updated every 10 years, although your driving entitlement will normally be valid until aged 70. Photocard licences have a second part called the Counterpart Licence, which contains relevant details of the driver including licence endorsements. When checking driver qualifications it is important that co-coordinators/supervisors do ask to see the counterpart and check for the accuracy of the information on it. Older paper based licences (green or pink) will still remain valid for the foreseeable future.

Further information:

CTA Advice Services

Minibuses & the Law - *CTA Publication*

Minibus Management - *CTA Publication*

Community Car Schemes - *CTA Publication*

Driving a Minibus - *DVLA Information Sheet: INF 28*

Driving in GB as a visitor or a new resident - *DVLA Information Sheet: INF38*

Driver Licensing Information - *DVLA Booklet: INS 57P DETR*

Further help & information

Acknowledgment

We would like to acknowledge the role of the National Centre for Volunteering in providing information for organisations working with volunteers. This freely available information has been invaluable in the preparation of this guide.

Useful Addresses

The Community Transport Association
Highbank
Halton Street
Hyde, Cheshire

General enquiries 0161 351 1475
Advice Line 0161 367 8780

www.communitytransport.com

CTA publishes a wide range of books about the practicalities of setting up and operating a Community Transport scheme. They also operate a national advice line for CT schemes and run training courses covering all aspects of operation and management.

National Centre for Volunteering
Regent's Wharf
8 All Saints Street
London
N1 9RL
www.volunteering.org.uk

Active Communities Unit
The Home Office
Direct Communications Unit
50 Queen Anne's gate
London
SW1 9AT
Tel: 020 7035 5331
Fax 020 7273 3475
Email: public.enquiries@homeoffice.gsi.gov.uk

This Government office is responsible for supporting volunteering and the voluntary and community sector.

Criminal Records Bureau (CRB)
Customer Services
LIVERPOOL L3 6ZZ
Website: www.crb.gov.uk
Information Line: 0870 909 0811

Retired & Senior Volunteer Programme (RSVP)
237 Pentonville Road
London
N1 9NJ
Tel 020 7278 6601
RSVP (a part of Community Service Volunteers) promotes volunteering by older people and matches individuals with local voluntary opportunities.

REACH
89 Albert Embankment
London SE1 7TP
Tel. 020 7582 6543
Fax. 020 7582 2423
email: info@reach-online.org.uk.
REACH brings together voluntary organisations and experienced people who want to offer their career skills as volunteers

Volunteer Development England (VDE)
New Oxford House
16 Waterloo Street
Birmingham
B2 5UG
Tel: 0121 633 4555
Fax: 0121 633 4043
email: info@vde.org.uk
VDE is the membership association of Volunteer Development Agencies - local voluntary organisations rooted in urban and rural communities throughout the country

Publications

CTA Publications

Accessible Minibuses - Design specification and purchase of 9-16 passenger seat vehicles; ISBN 1-903146-00-3; £10

Community Car Schemes - Organised lift-giving using voluntary drivers and their cars; ISBN 0 9522439 9 7; £10

Let's get Going - An action guide for community transport in rural England; ISBN 1 903146 02; £7.50

Minibuses and the Law - Compliance with legislation for non-profit minibus operation; ISBN 1 903146 03 8; £15

Minibus Management - Operation, maintenance & management of 9-16 seat vehicles; ISBN 1-903146-01-1; £25

Community Buses - Operation of local bus services by community groups: £10 ISBN 0-9522439-8-9; £10

National Centre for Volunteering

Informative website with:

Free online information sheets

Free online publications

Range of paid-for publications covering all aspects of volunteering.

All of the National Centre for Volunteering's information sheets are at:

www.volunteering.org.uk/workwith/sheets.htm.

The information service can be contacted on freephone/textphone 0800 028 3304 or e-mail information@thecentre.org.uk.

Other Publications

The Voluntary Sector Legal Handbook,

Sandy Adirondack and James Sinclair Taylor; Directory of Social Change, 2nd edition, 2001. ISBN 1 900360 72 1; Voluntary organisations £42, others £60 from Sandy Adirondack, bookshops or Directory of Social Change.

Virtually everything you need to know about the law as it affects charities, community groups and other voluntary organisations—updated to early 2001

Just About Managing? - Effective

Management for Voluntary Organisations & Community Groups, Sandy Adirondack; London Voluntary Service Council, 3rd edition, 1998. ISBN 1-872582-17-6; £18.95 from Sandy Adirondack, bookshops or London Voluntary Service Council.

Training

Community Transport Association

The CTA offers a wide range of training in addition to the MiDAS scheme mentioned in the body of the guide. This is only a selection of the training that can be provided to CT groups.

Contact CTA training services on 0161 366 6685 or e-mail: training@communitytransport.com

PATS is the **Passenger Assistant Training Scheme**. This training has been developed, in response to “customer demand”, to establish a single UK wide standard for the specialist training and knowledge required by voluntary and paid staff who accompany or escort passengers. The scheme is relevant to Passenger Assistants working in minibuses, cars, taxis and large buses. PATS is also a cascade system, and has a number of optional modules:

- *First Aid/Emergency Aid*
- *Advanced Moving and Handling*
- *Managing Challenging Behaviour.*

MEEP stands for **Minibus Emergency Evacuation Procedures**. This course demonstrates how to evacuate your minibus under emergency conditions.

Community Car Scheme Driver Training has been developed along the lines of MiDAS to ensure volunteer car drivers are aware of their responsibilities and provide them with the key skills in passenger assistance. As a cascade, you can choose to have your own Driver Awareness trainer - this might be a key responsibility of the scheme organiser.

Car Scheme Management provides comprehensive information on how to set up and run a community car scheme.

Other training from the CTA

The CTA is the UK's largest supplier of specialised training, delivered through national, regional and, on demand, local training events. The following is only a summary of the main courses requested directly from CTA.

Volunteer Management provides a comprehensive look at all aspects of attracting, selecting and keeping your volunteers, what motivates them and the need to create a positive working environment. A course that is complementary to this guide.

Passenger Safety raises the general awareness of passenger safety and outlines the major factors affecting the safety of passengers travelling in minibuses,

Community Transport for Beginners has been designed for anyone new to CT or thinking of setting up a scheme.

Health and Safety for CT Schemes is targeted at transport managers, co-ordinators and committee members. It relates to the working environment of CT groups.

National Centre for Volunteering

The **National Centre for Volunteering** offers a range of professional-level training courses, in the core skills of volunteer management, in London, Manchester and Leeds.