

5.2 ESSENTIAL POLICIES

Policies set a foundation to build best practice and ensure your organisation is fully prepared to take on new volunteers and to fully support your existing volunteers. If you are a volunteer involving organisation you will need to ensure that your written policies include volunteers as well as staff. Policies are as equally important to small volunteer involving organisations as they are to national organisations who engage with hundreds of volunteers and employ many staff.

The table below lists the policies you should really have in place before you consider taking on volunteers.

5.2.1 Equality and Diversity

The Equality Act 2010 applies to private, public and voluntary organisations and states that all employers and service providers have a responsibility under the law to treat their employees and service users (including volunteers) fairly. If you are not providing services to the public, you will also have responsibilities if you are a private club or association to protect volunteers from discrimination, harassment or victimisation on the grounds of the protected characteristics.

There are eight protected characteristics of people who use services, such as volunteers:

- Disability
- Gender reassignment
- Pregnancy and maternity
- Race
- Religion or belief
- Sexual orientation
- Sex (gender)
- Age

You are not able to select your volunteers based on any of the protected characteristics listed above over another volunteer who has more experience or more relevant skills. The only situation where you are able to choose a volunteer who has a particular characteristic is if there are two volunteers who are equally able and/or qualified to fulfil the role.

Organisations or groups can recruit specifically from a certain group if there is a 'business reason'. For example a helpline aimed at women suffering from domestic abuse may only recruit female volunteers.

You do not have to monitor equality and diversity, but it can be a positive way of demonstrating commitment to promoting equality and diversity of opportunity in volunteering. Monitoring can help to determine the success of policies and practices adopted to maintain or promote equality.

5.2.2 Health and Safety

The Health & Safety at Work Act (1974) is the main legislation covering occupational health and safety in the United Kingdom. It sets out general duties for employers to ensure that as far as possible their employees, and others who may be affected by their activities including volunteers and members of the public are protected from physical, financial and emotional harm.

To create a culture of accountability you might feel it is helpful to promote the rights and responsibilities for the organisation and the volunteers in relation to health and safety. This could form part of your volunteer agreement.

A short, user friendly health and safety policy which refers to other separate documents (for example, lone working, risk assessment, first aid, fire, working off site, use of equipment and driving etc.) is worth considering, as a long document can be overwhelming. Try viewing this policy as a statement of intent, with the day-to-day nuts and bolts covered in separate policies or in a volunteer handbook.

5.2.3 Insurance

All volunteer involving organisations should have an insurance policy that covers volunteers. As a minimum, the organisation itself should be covered either under employer's liability insurance or public liability insurance in the event of volunteers being harmed due to the organisation's negligence. In addition it is recommended that you also have professional indemnity insurance for volunteer involving organisations where volunteers are involved in providing information, advice or other professional services. If your organisation owns or operates motor vehicles it is compulsory to have insurance against third party injury and property damage. If trustees, employees or volunteers are using their own vehicles for the purposes of the organisation or on the business of the organisation, you must make sure that the insurance held by the owner of the vehicle covers such use.

Some things you should check with existing or potential insurance providers:

- The policy definitely includes volunteers
- How the term 'volunteer' is defined for the purposes of the policy
- The policy covers the types of activities the volunteer will be undertaking
- There is no upper or lower age limit for volunteers.

There are many other forms of insurance that you may want to consider depending on the purpose and structure of your organisation and these could include:

- Directors and officers insurance
- Trustee indemnity insurance
- Personal accident insurance
- Buildings and contents insurance

5.2.4 Expenses

For organisations, covering expenses often makes up a fair proportion of volunteering costs so it's important that you budget for them even though not all volunteers claim expenses and include the details of what paying all expenses could cost you in any funding applications and grants.

Your expenses policy will need to be specific to your organisation. Think about what volunteers do with you, when and where they volunteer and when they might have to spend extra money whilst volunteering and decide what you should cover or reimburse. You may decide to reimburse authorised out of pocket expenses only or you may decide to cover volunteer mileage, equipment costs, telephone costs or meals.

Clearly define what your organisation will cover, the frequency and method of payment and how volunteers can claim.

It's important that money given to volunteers should only be for actual expenses as there could be tax implications for the volunteer if this is not the case.

Sometimes volunteers feel that they should not claim expenses. This might be because they feel it's asking for too much or because they don't need the money. Having money there to cover costs for volunteers is part of knowing the true cost of planning for volunteers so it's good to encourage volunteers to claim it. If a volunteer insists that they don't want to claim expenses then they could chose to give their expenses back to the organisation as a donation or as Gift Aid.

Volunteer Scotland is an excellent source of information for Volunteering policies. Some of their more detailed guidance and example policies can be found in [our Resource Library](#)