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# Volunteer Management Handbook

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Helping you create safe, meaningful and impactful volunteering experiences.

**Voluntary Sector Gateway West Lothian**

20-22 King Street, Bathgate, West Lothian EH48 1AX

Tel: 01506 650111 | Email: [vsg@vsgwl.org](mailto:vsg@vsgwl.org) | Web: [www.voluntarysectorgateway.org](http://www.voluntarysectorgateway.org)

Voluntary Sector Gateway West Lothian is a Registered Company in Scotland No. SC244154 and Registered Scottish Charity No. SC027612

## The Volunteer Charter

The **Volunteer Charter has 10 Core Principles**, outlining the ten fundamental principles that underpin "good" volunteering. Organisations do not have a requirement to use all or any of the principles; however, these are a great guide to Good Volunteer Management. These principles are set out in table below:

Principle	Description
<b>Any volunteer activity is a freely made choice</b>	Any volunteer activity is a freely made choice of the individual. If there is any compulsion, threat of sanctions or force, then any such activity is not volunteering.
<b>No financial reward</b>	Volunteers should not receive for their time; however, out of pocket expenses should be covered. No one should be prevented from volunteering due to their income.
<b>Effective Structures</b>	Effective structures should be put in place to support, train and develop volunteers. This also includes collaboration with paid workers.
<b>Safe Environment</b>	Volunteers and paid workers should be able to carry out their duties in safe, secure and healthy environments. Free from harassment, intimidation, bullying, violence and discrimination.
<b>Formerly Paid Roles</b>	Volunteers should not carry out duties formerly carried out by paid workers. Nor should they be used to disguise the effects of non-filled vacancies or cuts in services.
<b>Not to Replace Paid Workers</b>	Volunteers should not be used instead of paid workers or undercut their pay and conditions of service. Nor undertake the work of paid workers during industrial disputes.
<b>Reduce Contract Costs</b>	Volunteers should not be used to reduce contract costs. Nor be a replacement for paid workers in competitive tenders or procurement processes.
<b>Bypass or Profits</b>	Volunteers should not be used to bypass minimum wage legislation. Nor generate profit for owners.

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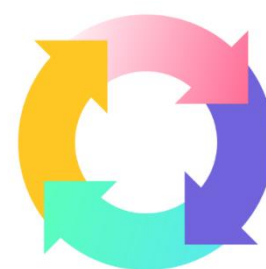
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Principle	Description
<b>Contribution</b>	Volunteers and paid workers should be allowed to contribute to the development and monitoring of volunteering policies and procedures Including the need for policies that resolve any issues or conflicts that may arise.
<b>Volunteer Needs</b>	Volunteer roles should be designed and negotiated around the needs and interests of volunteers, involving organisations and wider stakeholders Finding legitimacy and avoiding exploitation through consensus depends on mutual trust and respect.

## The Volunteer Management Cycle

Investing in Volunteers helps you assess and improve the quality of your volunteer management and involvement, prove and improve the effectiveness of your work with volunteers and enhance your organisation's reputation

Effective management follows a structured lifecycle to ensure safety and engagement. Some ideas for effective management are:



### A. Recruitment and Safeguarding Tips

**Role Descriptions:** Clearly define what a volunteer will do, avoiding any employment-speak (e.g., use "Volunteer Agreement" instead of "Contract").

**PVG Scheme (Protection of Vulnerable Groups):** In Scotland, if a volunteer works in "regulated role" with children or protected adults, they must be a member of the PVG scheme. As of 2026, fee waivers remain a priority for qualifying voluntary organisations.

**Advertising:** Use Volunteer Scotland's national search engine and local Third Sector Interfaces (TSIs) to advertise your available roles.

### B. Induction and Training Tips

- **Health and Safety:** You have a duty of care to volunteers and they receive the same safety training and risk assessments as paid staff.

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- **Insurance:** Ensure your Public Liability and Employer's Liability insurance and policies explicitly cover volunteers.

### C. Support and Supervision Tips

**It is good practice** to distinguish between Support, which can be well-being and motivation, to Supervision, which can be task-related guidance. Regular check-ins with your volunteers help prevent burnout, particularly in high-stress roles.

## Legal and Regulatory Framework

Managing volunteers in Scotland requires navigating specific legal boundaries to avoid creating an "accidental" employment contract:

1. **Avoid Contracts:** Do not use language that implies a legal obligation to work or a guarantee of shifts.
2. **Payments:** Only reimburse actual expenses, log these, and keep receipts. Giving flat-rate "allowances" can be seen as a wage by HMRC.
3. **Equality Act 2010:** While volunteers aren't technically employees, Scottish organisations are strongly advised to follow the Equality Act to prevent discrimination and maintain Safe and Inclusive environments.

## The Strategic Context - Volunteering for All

Volunteering in Scotland is guided by a national framework that aims to make volunteering inclusive and accessible. The current strategy focuses on:

- **Inclusion:** Reducing the Participation Gap between the most and least deprived areas (currently around a 15% disparity).
- **Sustainability Moving toward:** "Fair Funding" to ensure organisations can afford to support and train their volunteers properly.



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- **Health and Wellbeing:** Recognising volunteering as a key component of social prescribing and mental health support.

## Key Resources for Managers

If you are managing a program in Scotland, these organisations are your primary support network:

- **Volunteer Scotland:** The national body for policy, PVG checks, and best practice guides.
- **SCVO (Scottish Council for Voluntary Organisations):** Provides guidance on governance and "Fair Funding."
- **TSIs (Third Sector Interfaces):** Every local authority in Scotland (e.g., Glasgow, Edinburgh, West Lothian) has a TSI that provides local support for volunteer recruitment and management.

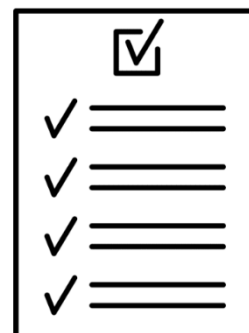
**Note:** If your organisation involves young people, remember that the **Saltire Awards** is the Scottish Government's way of celebrating the commitment of volunteers aged 11-25.

<https://saltireawards.scot/>

## Example Volunteer Policy

An "internal" high-level document that tells the world how your organisation treats volunteers.

It is good practice to have an up-to-date Volunteer Policy and other relevant documents in place. Here is an example of a Volunteer Policy you may wish to consider using the template below:



### Volunteer Policy Template (Example)

**Organisation Name:** (Insert Name) **Date of Policy:** (Insert Date)

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## Statement of Intent

We recognise volunteers as a vital part of our mission. We aim to involve volunteers to (insert goal, e.g., enhance our service delivery/connect with the local community). We do not use volunteers to replace paid staff.

## Recruitment & Safeguarding

- **Equal Opportunities:** We welcome volunteers from all backgrounds.
- **Safe Recruitment:** For roles involving a "regulated role," a PVG Scheme record check is mandatory before commencement.
- **References:** At least (Number) references will be required.

## Support & Expenses

- **Induction:** All volunteers will receive a tour, a health and safety briefing, and a named supervisor.
- **Expenses:** We will reimburse "out-of-pocket" expenses (travel, parking, and pre-approved materials) upon receipt. **We do not pay flat-rate allowances.**

## Insurance & Health and Safety

Ensure Volunteers are covered under your Public Liability and Employer's Liability insurance while performing authorised tasks.

## Example Volunteer Agreement:

This is a document you give to the volunteer. It is a "Statement of Expectations," not a legal contract.

## Volunteer Agreement (Example):

### [Role Title]

This agreement is based on mutual trust and does not create a legally binding contract of employment. We appreciate you choosing to volunteer with us!

### What you can expect from us:

**Support:** [Name/Role] will be your main point of contact for any questions.

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**Training:** We will provide the necessary training to perform your role safely.

**Reimbursement:** We will pay back your lunch or bus/train fares or mileage at (Amount) per mile within [Number] days of a claim.

**Voice:** We will listen to your feedback and treat you with respect.

### What we hope for from you:

- **Reliability:** To perform your role to the best of your ability and let us know as soon as possible if you cannot make it.
- **Values:** To follow our policies, especially around Inclusion and Confidentiality.
- **Safety:** To report any hazards or accidents immediately to your supervisor.

**Safeguarding Commitment:** By signing, you agree to adhere to our Safeguarding Policy and, where applicable, maintain your PVG membership.

**Volunteer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### Key Tips:

1. **Language Matters:** Use "Expectations" instead of "Requirements" and "Role Description" instead of "Job Description." This prevents any accidental claim that the volunteer is an "employee" or "worker."
2. **PVG Checks:** The PVG check is often free for volunteers in the third sector. Make sure your organisation is registered with Volunteer Scotland Disclosure Services to access this.
3. **Saltire Awards:** If your volunteer is aged 11 - 25, mention in the agreement that their hours can be logged for a Saltire Award, which is highly regarded by Scottish employers and universities.

**Role descriptions** are a valuable tool to both the organisation and the volunteer. Here is an example of a description for the role of Volunteer Event Assistant, that follows the expectations model favoured by Volunteer Scotland to ensure the role is clearly distinguished from a paid employment contract.

## Example Role Description: Volunteer Events Assistant

**Location:** (Specific Venue / Region-wide / Hybrid)

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**Responsible to:** (Events Coordinator / Volunteer Manager)

**Commitment:** (e.g., Flexible, based on event schedule / 4 hours per month)

### Purpose of the Role

The Volunteer Events Assistant plays a key part in helping our events run smoothly. Whether it's a community fundraiser, a local workshop, or a large-scale festival, your presence ensures our attendees feel welcomed and the logistics are handled with care.

### Main Tasks & Activities

We hope you can help us with:

- **Event Set-up:** Assisting with signage, arranging seating, and setting up information stalls.
- **Front of House:** Greeting guests, scanning tickets, and providing information about the day's schedule.
- **Hospitality:** Assisting with the serving of light refreshments and snacks.
- **Support:** Helping with basic administrative tasks during the event, such as distributing feedback forms or managing a cloakroom.
- **Pack-down:** Helping to tidy the venue and ensuring all equipment is safely stored after the event ends.

### Skills and Qualities

We are looking for people who:

- Are friendly, approachable, and enjoy meeting new people.
- Have a "can-do" attitude and a flexible approach to tasks.
- Can follow health and safety guidelines (training provided).
- Are reliable and can let us know in advance if they cannot attend.

### What We Offer You

- **Training:** You will receive a full induction, including health and safety and any specific training needed for the event (e.g. food hygiene).
- **Expenses:** We will reimburse your travel costs (bus/train/mileage) in line with our expenses policy.

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- **Saltire Awards:** If you are aged 11-25, your hours can count toward a nationally recognised Saltire Award.
- **Experience:** A chance to build your CV, gain event management insight, and meet your local community.

## Understanding Your Organisation's Structure

In Scotland, event management often involves multiple layers of support. The diagram below illustrates how a typical volunteer-supported event team is structured to ensure everyone has the support they need.

### Important Notes for the Manager:

- **Regulated Role:** If the event involves children or protected adults, this role may fall under "Regulated Role." If so, you must ensure the volunteer has a PVG Scheme membership before they start.
- **Health & Safety:** For events, you must provide a specific Risk Assessment briefing to the volunteer on the day of the event, covering fire exits, first aid points, and manual handling (if they are helping move furniture).
- **Equality:** To align with Scotland's Volunteering Action Plan, consider if the role can be made accessible (e.g., providing quiet spaces for volunteers who might be neurodivergent).

## The Volunteer Manager's 2-Minute Checklist

### 1. Create a Volunteer Record

### 2. Safeguarding & PVG

- **Role Assessment:** Does this role involve "Regulated Work" with children or protected adults?
- **PVG Check:** If yes, has the volunteer been cleared by Disclosure Scotland before they start their duties?
- **References:** Have I secured at least two references to verify their suitability?



### 3. Health, Safety & Induction

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- **Risk Assessment:** Have I documented the risks for this specific role (e.g., event manual handling, lone working)?
- **The "Grand Tour":** Does the volunteer know where the fire exits, first aid kits, and toilets are?
- **Emergency Contact:** Do we have an up-to-date emergency contact number for the volunteer on file?

#### 4. Support & Recognition

- **The Named Contact:** Does the volunteer know exactly who to call if they are running late or have a problem?
- **Saltire Awards:** If they are under 25, have I registered them or explained how they can claim their hours?
- **Feedback Loop:** Is there a scheduled time (even 10 minutes) for a monthly "How are things going?" chat?

### Quick Directory for Managers

Resource	Best for...
<b>Volunteer Scotland</b>	PVG help, national policy, and legal templates.
<b>Local TSI</b>	Advertising roles locally and networking with other managers.
<b>MILO</b>	The database used by most TSIs to manage volunteer opportunities.
<b>Investing in Volunteers (iV)</b>	Investing in Volunteers - The UK-wide quality standard if you want to get accredited.

**Pro-Tip:** In the current climate, flexibility is king. Many volunteers are looking for "micro-volunteering" (short-term, one-off tasks). Try to break your Event Support roles into small, manageable shifts rather than demanding a full-day commitment!

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## Example Email template you can use to invite a new volunteer to their first induction session

**Subject:** Welcome to the Team! | Your Volunteer Induction at [Organisation Name]

**Hi [Volunteer Name],**

A huge thank you for choosing to volunteer with us as an **Events Support Volunteer**. We are thrilled to have you on board!

As discussed, the next step is a short induction session to get you settled, introduce you to the team, and ensure you have everything you need to feel confident in the role.

### Induction Details:

- **Date:** [Date]
- **Time:** [Time]
- **Location:** [Full Address/Meeting Point]
- **On Arrival:** Please ask for [Name of Contact Person] at the main reception.

### What we'll cover:

- A quick tour of the venue (including the all-important tea and coffee station!).
- A briefing on our upcoming events and your specific role description.
- **Health & Safety:** A run-through of our safety procedures and risk assessments.
- **Expenses:** How to claim back your travel costs (please bring your bus/train tickets or let us know your mileage).
- **The Paperwork:** Finalising your Volunteer Agreement and, if required for your role, completing your PVG (Protection of Vulnerable Groups) application.

### Please bring with you:

- A form of ID (if we are processing a PVG check).
- Any questions you might have for us!

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We want your experience with us to be rewarding and fun. If you have any specific access requirements or need any adjustments made for the induction, please just let me know—we want to make sure everyone can participate fully.

We're really looking forward to working with you to make our upcoming events a success.

Best regards,

**[Your Name]** [Your Title] [Organisation Name] [Phone Number]

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### A Final Tip for the Manager:

The first 15 minutes of the induction are the most important for "retention." Instead of starting with paperwork, start with a success story about how a previous event helped a local person. This connects the volunteer to your mission immediately!

To help you get your operations running smoothly, here are two essential templates. These are designed to be practical, compliant with Scottish third-sector standards, and easy to use on the day of an event.

## Example Volunteer Expenses Claim Form

It is vital to reimburse actual costs to avoid "employment" status. Use this template to keep your records tidy.

**Organisation:** [Name] **Volunteer**

**Name:** \_\_\_\_\_ **Month/Period:** \_\_\_\_\_

Date	Description (e.g., Bus to Event, Parking)	Amount (£)	Receipt Attached?
			[ ]
			[ ]
			[ ]
<b>Total</b>		<b>£</b>	

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**Payment Method:** Bank Transfer (BACS)

Petty Cash **Volunteer**

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Manager Approval:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## Example Event Risk Assessment (Volunteer Focus)

Under the Health and Safety at Work Act, you have a "Duty of Care" to volunteers. Use this simple matrix to identify and mitigate risks for your Events Support team.

**Event Name:** (Insert Event) **Assessor:** (Your Name] **Date:** ( )

Hasard	Who is at risk?	Mitigation (The "Safety Plan")
<b>Manual Handling</b> (Moving chairs/tables)	Volunteers	Brief volunteers on "safe lifting." Ensure no one works alone. Use trolleys where available.
<b>Slips/Trips</b> (Cables, wet floors)	Volunteers & Public	Tape down all cables. Ensure "Wet Floor" signs are ready. Keep fire exits clear at all times.
<b>Lone Working</b> (Late night finishes)	Volunteers	Ensure a "Buddy System" is in place for walking to cars/public transport after dark.
<b>Stress/Overwhelm</b> (Busy crowds)	Volunteers	Ensure a designated "Quiet/Break Area" is available. Rotate shifts every 2 hours.
<b>Food Hygiene</b> (Serving tea/cakes)	Public	Ensure volunteers wash hands and follow the "Allergen Checklist" provided.

## Pro-Manager Tips for Events

1. **The "Allergen" Rule:** If your event volunteers are serving food (even home-baking), Scottish law requires you to be able to identify the 14 major allergens. Have a simple folder with "Ingredients Lists" at the tea station.
2. **Weather Preparedness:** If the event is outdoors (especially in February!), your "Duty of Care" includes ensuring volunteers have access to warmth, waterproofs, and hot drinks.

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3. **The "Go-To" Person:** Always give volunteers a High-Vis vest or a specific **Lanyard** so they are easily identifiable to the public, and ensure they know who the First Aider is.
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## Final Documentation Package

You now have a complete toolkit for Volunteer Management in Scotland:

- **National Strategy & Context**
- **Policy & Agreement Templates**
- **Role Description (Events)**
- **PowerPoint Structure & Speaker Notes**
- **Management Checklist**
- **Induction Email**
- **Expenses & Risk Assessment Forms**

This example of a **Volunteer Handbook Outline**, serves as the "Master Document" that brings together everything we have discussed. In the Scottish third sector, a handbook is often referred to as the "living version" of your policy—it's the go-to guide for a volunteer to feel settled and safe.

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## (Organisation Name) Example Volunteer Handbook

**Version:** 2026.1 | **Review Date:** February 2027

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### Section 1: Welcome & Our Values

- **A Message from our CEO/Board:** A warm welcome explaining why we value volunteers.
- **Our Mission:** What we are trying to achieve in Scotland and your local community.

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- **The Volunteer Charter:** A commitment that we follow the 10 national principles (e.g., you are never a replacement for paid staff).

## Section 2: Your Role & The Team

- **Role Descriptions:** Reference to your specific "Events Support" or other role profiles.
- **Who's Who:** A list of key contacts (Supervisor, First Aider, Safeguarding Officer).
- **The "Agreement":** Clarifying that this is a relationship of mutual trust, not a legal contract.

## Section 3: Safe & Inclusive Volunteering

- **Safeguarding & PVG:** Our commitment to the Protection of Vulnerable Groups.
- **Equality & Diversity:** How we ensure everyone, regardless of background, is welcome.
- **Health & Safety:** \* Your duty of care to yourself and others.
  - How to report an accident or "near miss."
  - Fire safety and venue-specific rules.

## Section 4: Practicalities (The "How-To")

- **Induction & Training:** What to expect in your first few weeks.
- **Claiming Expenses:** \* *The Rule:* We reimburse actual out-of-pocket travel and meal costs.
  - *The Process:* How to use the "Expenses Claim Form" we created earlier.
- **Insurance:** Confirmation that you are covered by our Public and Employer's Liability policies.
- **Confidentiality:** Keeping the data of our service users and the organisation safe.

## Section 5: Support & Development

- **Check-ins:** How we will support you (informal chats, feedback sessions).

- **Young People (Saltire Awards):** How to log your hours for national recognition.
- **Problem Solving:** What to do if you aren't happy or if a conflict arises.
- **Moving On:** How we support you when you decide to finish your volunteering journey (references, exit chats).

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## Your Complete "Scottish Volunteer Management" Toolkit

You now have the following documents ready to be branded and used:

1. **Strategic Overview:** The national context and the Volunteer Charter.
2. **Volunteer Policy:** Your high-level organisational commitment.
3. **Volunteer Agreement:** The "handshake" document for new starts.
4. **Role Description:** Specific to "Volunteer Events Support."
5. **PowerPoint Presentation:** Complete with speaker notes for training staff or boards.
6. **Manager's Checklist:** Your 2-minute "cheat sheet" for compliance.
7. **Induction Email:** A welcoming template for new recruits.
8. **Expenses Form:** To ensure volunteers aren't out of pocket.
9. **Risk Assessment:** A template for keeping your events safe.
10. **Handbook Outline:** The structure for your final volunteer guide.

To complete your documentation, here is the text for the two most sensitive sections of your handbook: the **Problem Solving Procedure** and the **Confidentiality & Data Protection Policy**.

These are written specifically for the Scottish Third Sector, ensuring they are robust yet maintain the "non-contractual" nature of volunteering.

## 1. Problem-Solving Procedure

*In Scotland, we avoid using the term "Disciplinary" for volunteers to maintain the distinction from paid employment. Instead, we use a "Problem Solving" approach.*

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## Example Approach

We aim to resolve any issues quickly and fairly through informal discussion. However, if a problem persists, we follow these steps:

1. **Informal Discussion:** Your supervisor will meet with you to discuss any concerns (e.g., reliability or conduct). This is a two-way conversation to see if you need more support or training.
2. **Formal Meeting:** If the issue isn't resolved, you will be invited to a more formal chat with the [Volunteer Manager/Director]. You are welcome to bring a friend for support. We will agree on a "support plan" with a timeline for improvement.
3. **Withdrawal of Volunteer Role:** If we cannot reach a solution, or in cases of **Gross Misconduct** (e.g., theft, violence, or a serious safeguarding breach), we reserve the right to end the volunteering arrangement immediately.

## Example - Confidentiality & Data Protection Policy

*This ensures your organisation complies with UK GDPR and the Data Protection Act 2018 while volunteers are active in the field.*

### Your Commitment

As a volunteer, you may have access to sensitive information about our organisation, our service users, or our staff.

- **Privacy:** Personal information about service users or staff must never be shared outside of the organisation.
- **Social Media:** Please do not post photos of service users or internal documents on your personal social media without explicit written permission from [Role Title].
- **Reporting:** If you accidentally lose a document containing personal data or send an email to the wrong person, you must tell your supervisor immediately so we can follow our **Data Breach** procedure.

### Our Commitment to You

We will only hold the personal data we need to manage your volunteering (e.g., your contact details and PVG status). We store this securely and will never sell your data to third parties. You have the "Right to Erasure" (to be forgotten) once you

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stop volunteering with us, subject to statutory record-keeping (like financial or safeguarding logs).

## Final Summary of your Toolkit

You now have a **complete, end-to-end volunteer management system** for Scotland:

1. **National Strategy & Context**
2. **Volunteer Policy**
3. **Volunteer Agreement**
4. **Events Support Role Description**
5. **Management Checklist**
6. **Induction Email Template**
7. **Expenses Claim Form**
8. **Event Risk Assessment**
9. **Comprehensive Volunteer Handbook Outline**
10. **Detailed Problem Solving & Confidentiality Clauses**

## You are now fully equipped!

You have every document, template, and strategy needed to lead a volunteer program in Scotland.

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