

## Screening volunteers

### Summary

The purpose of screening volunteers is to ensure that the appropriate volunteers are recruited for the appropriate projects.

The screening process therefore is used to answer two questions

1. Is the volunteer suitable for the project (and, if relevant, to work with your client group)?
2. Is the project suitable for the volunteer and will it meet their expectations?

This Information Sheet covers:

- Tools and methods of screening
- Responsibility
- What you can do to show that you are acting reasonably

Screening is a valuable part of the volunteer management process as it involves ensuring the volunteer is properly trained for their role and understands what is expected from them.

It is also an important part of your risk assessment process. You should always make every effort to place a new volunteer in a role which would be suitable and safe for them and for anyone else coming into contact with them, (such as other volunteers, paid colleagues, clients and service users or members of the public).

There may be some occasions where you are unsure whether a particular role is suitable for a new volunteer. In some cases, it might be wiser to suggest a different volunteer role. In other cases, you may decide to give the volunteer a chance to try out the role and offer them extra support or training.

Screening should also be a continuous process. You can use supervision and other feedback methods to check whether a particular role is still suitable for a volunteer, or whether anything has changed.

## Tools and methods of screening

The following is a list of tools and methods that can be used to help with screening volunteers.

- Ensure you have clearly drafted policies and procedures on recruitment, including a policy on rejecting an applicant.
- Provide clear role descriptions so that potential volunteers know what is expected of them.
- Provide suitable application forms.
- Interview potential volunteers using informal and/or formal methods.
- Take references – academic/professional/family.
- Criminal Record Bureau Disclosures – these are **not** sufficient alone.
- Home visit.
- Provide a full induction and training.
- Provide a taster session and/or shadowing period.
- Have an introductory period.
- Match the volunteer to a buddy for peer support.
- Ensure clear links are established for feedback and support.
- Conduct regular performance assessments and supervision.
- Have the volunteer reflect on their volunteering experience.
- Set up exit interviews.

This is not a definitive list to be followed for every volunteer. It is a list of potential steps you might consider depending on the circumstance, the role, the volunteer and the project.

## Responsibility

If you are placing volunteers on projects you have a legal duty of care to ensure the volunteer is suitable for that project and must act reasonably when making that decision. Making a mistake does not necessarily mean you have not acted reasonably.

Generally speaking, you will be acting on behalf of your organisation and they would be liable for anything which goes wrong. However, in some extreme cases, it is possible that a volunteer co-ordinator could individually be held liable. For instance, if your organisation isn't properly constituted as a legal entity, then legal liability will lie with the individuals who are organising the activity. (For more information on governance and setting up voluntary groups, you can contact your local Council for Voluntary Service – please read the contact details at the end of this Information Sheet.)

## What can you do to show that you are acting reasonably?

- Do not rely on 'gut instinct'.
- Ensure you have followed the agreed policies and procedures and that you have written evidence that you have done so.
- Ask for advice from fellow practitioners or advisory bodies such as Volunteering England, the NSPCC, the crime reduction charity Nacro etc.
- If you are working with an external organisation then try to ensure they take responsibility for the actions of the volunteers you are placing with them and that they know what screening you have done (if any) and what screening you have left for them to complete.
- Talk to the potential volunteer if you have concerns. Be clear with them about the confidentiality of your discussion and about what information needs to be shared with managers or trustees in the organisation.
- If in doubt, re-consider the risk assessment for your project. Where necessary, adapt your activities so that potential risks can be reduced to levels which you, your colleagues and your insurers feel are acceptable. (More information on risk assessment can be found in the 'Health and Safety and Insurance' Theme of Volunteering England's Good Practice Bank.)
- If you do decide that a potential volunteer is unsuitable for a role, try to explain the reasons with honesty and sensitivity.
- Try to suggest alternative roles within your organisation or signpost the applicant to a Volunteer Centre which can help them to find other local volunteering opportunities. (To find your local Volunteer Centre, visit: [www.volunteering.org.uk/finder](http://www.volunteering.org.uk/finder))

## Further information

### **NAVCA (The National Association for Voluntary and Community Action)**

Contact details for your local Council for Voluntary (CVS) can be found on NAVCA's website in their directory of members and local contacts at

<http://webdb.navca.org.uk/home.aspx>

***The Risk Toolkit. How to take care of risk in volunteering: a guide for organisations,*** Volunteering England and the Institute for Volunteering Research

<http://www.volunteering.org.uk/risk>

### **Volunteering England Good Practice Bank**

- 'Health and Safety and Insurance' Theme contains information on risk assessment, insurance and health and safety
- 'Protection and Safeguarding' Theme contains information about Criminal Record Disclosures and the Vetting and Barring Scheme

<http://www.volunteering.org.uk/goodpractice>

**Last reviewed: November 2009**

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