



# Managing Challenging Volunteer Situations

## Why is having a process for managing challenging volunteer situations important?

Some volunteers are involved in tasks that could be high risk, such as looking after older people, people with drug or alcohol issues, or using technical equipment. Volunteers also represent your organisation with service users and externally. If there's not a procedure in place to manage problems when they come up then it's easy for even small things to grow out of control. Having guidance on what is acceptable, that explains how you will respond to a challenging situation is important to protect everyone.

Having a clear process also shows that you'll deal with anything that comes up in the same way. It's part of making sure that volunteers are treated fairly and helps make sure that all parties are treated with respect. All complaints should be dealt with openly, fairly and quickly to protect your volunteers, have a minimum impact on staff, service users and other volunteers. This shows that your organisation respects its volunteers.

## Should volunteers follow the same procedure as staff?

No. As volunteers don't have a contract like paid staff the grievance and disciplinary procedures for staff can't apply to volunteers as well. Giving volunteers access to some or all employment rights risks creating a contract with your volunteers. So, separate policies for staff and volunteers are needed.

Although they need to be different, it's important to make sure that the process for volunteers doesn't contradict anything that's in place for staff.

## When should you talk about the problem solving process?

The problem solving process should be covered with volunteers as part of the induction process along with any other relevant policies. If volunteers are clear of the boundaries for their role, this often avoids misunderstandings from the start. Volunteers should be aware of the potential action that could be taken if there is a breach of these policies.

There are three areas where a managing challenging volunteer situation process can be applied:

- **Capability:** a volunteer's ability to undertake the role
- **Performance:** how well a volunteer is performing the role
- **Conduct:** behaviour when taking part in volunteering.

## Informal and formal approaches

Dealing with issues with volunteers does not automatically mean that a formal process (excluding cases of gross misconduct) should begin. There are other options, described below, which should be used before any formal process. Also, even when a formal process has started, there are still alternatives to asking someone to stop volunteering.

### *Informal process*

- Informal procedures aim to resolve behaviour or performance that gives cause for concern as soon as possible.
- Regular support meetings are important for consistent management and communication with volunteers. They provide a good opportunity to talk about performance or conduct, including any specific concerns or complaints raised by a volunteer, or about the volunteer.
- When issues arise the volunteer manager should meet with the volunteer as soon as possible to ask what their view on the situation is. This is to establish the facts surrounding the issue and agree with the volunteer what they are expected to do in order to address this, the timeframe for improvements and for any follow up meetings.
- By meeting with the volunteer, what initially seems to be a serious problem may highlight a training need. Volunteers might not realise that something they're doing is a cause for concern, particularly if guidance or policy has changed since they joined the organisation.
- It can be difficult to give volunteers constructive feedback or raise issues, but a volunteer cannot be expected to improve or change the way they work if an issue has not been discussed with them. Often they will not be aware they have done something wrong and will want to improve.
- If, after the agreed time, informal procedures do not bring a positive change, the volunteer manager should initiate the formal process.

### *Formal process*

- If it is not possible to resolve issues using informal procedures then a more formal process can be used to manage the situation.
- In some cases if the issue is more serious, for example gross misconduct, then the formal process should begin sooner.
- Initial complaints should go to the person who supervises the volunteer. If the matter is not sorted out at this stage, then both parties should have the option to refer to a named person in a more senior position in the organisation.
- Volunteers should have the option of having a friend along to any meetings as part of this process.
- Any decisions, that are jointly agreed between you and the volunteer, on how to resolve the situation (more on alternatives below) should be written down and communicated to the volunteer either in writing or via email.
- If a volunteer has to leave as a result of these proceedings, you should let them know as soon as possible, during a face to face meeting if practical, and followed up in writing. The relevant members of staff and volunteers should be made aware of the situation.
- Asking a volunteer to leave can be extremely difficult. This may be needed if there is no satisfactory improvement in a volunteer's performance in the time frame discussed and agreed. The volunteer should be told as soon as possible of the reasons for this, the date on which their volunteering will end and their right of appeal.
- In extreme circumstances a volunteer may be asked to leave with, or without, notice. This is the most serious action that can be taken and is reserved for cases of gross misconduct. The instances which the organisation would regard as gross misconduct should be identified and should be clearly described in your policies. It should be included in information supplied to volunteers and to the staff who have responsibilities for supporting volunteers.

### *Alternative to dismissal*

There are options instead of asking a volunteer to leave. It might be that a previously punctual volunteer has started turning up late due to a change in personal circumstances. This may be due to caring responsibilities which they have not been able to discuss and that simply re-organising the volunteer's time could resolve the issue. These alternative options still allow the organisation or group to address a decline in a volunteer's performance but also to try and find a way for the volunteer to continue to remain with the organisation. Other alternatives are suggested below.

- Have regular meetings until the volunteer understands their role, their responsibilities, and the relevant policies.
- Re-assign the volunteer to a new role, perhaps better suited to their skills and motivations. This allows an enthusiastic volunteer to continue with the organisation, and the organisation to continue to benefit from their knowledge.
- Re-train in line as some volunteers take longer than others to learn new skills.
- Re-vitalise volunteers, perhaps by giving an opportunity to take a break. This is particularly relevant for very enthusiastic volunteers, who can sometimes over-commit themselves and suffer from burn out, who are performing a very demanding role, or who have had a significant change to personal circumstances such as a change of job or house move.
- Depending on the situation, a referral to a different organisation or to a Volunteer Centre may be appropriate.
- Retire/release with dignity if there is no alternative, but make this a very positive exit with the volunteer leaving, feeling that they have been appreciated.

### **What's next?**

You will have to write your policies for managing challenging volunteer situations to suit your organisation or group's situation but care should be taken to make the process as clear as possible, with everything in writing and definite steps and timescales given for dealing with the issue. It is a good idea to get volunteers and other staff to help you create them.

### **Need some more help?**

If you would like more help or advice in relation to this guide please get in touch with us:

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