

Volunteer Practice Guidance Note

Managing Challenging Volunteer Situations

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

Majority of volunteers have a positive and good experience but sometimes things can go wrong, and situations can become challenging, if there's not a procedure in place to manage problems when they come up, individuals are unsure how to respond to any challenging situations or when things go wrong. Understanding how to manage volunteer challenging situations will support a good volunteer experience.

It's part of making sure that volunteers are treated fairly and helps make sure that all parties are treated with respect. All situations should be dealt with openly, fairly and quickly.

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 won't apply to volunteers. Separate policies for staff and volunteers are required, to reduce the risk of indirectly creating a contract with the volunteers.

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 managing challenging situations process?

This should be covered with volunteers as part of the induction process along with any other relevant policies, you can use softer language like “problem-solving process”. This process will help volunteers understand how to raise an issue or how issues are dealt with, this often avoids misunderstandings from the start.

There are four areas where a managing challenging 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.
- Complaints: when a volunteer raises an issue or an issue raised against them.

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.
- 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, which 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 and it should be made clear why this decision was made.
 - Discussed during a face-to-face meeting if practical, and followed up in writing, the date on which their volunteering will end and their right of appeal.
 - The relevant members of staff and volunteers should be made aware of the situation.
 - Asking a volunteer to leave can be extremely difficult, but sometimes the best decision for both parties.
 - Volunteer should also have the right to end their volunteering when they wish and make this decision themselves.

Alternative to dismissal

There are options instead of asking a volunteer to leave:

- 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 them 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.
- A referral to a different organisation or to a Volunteer Centre may be appropriate, if the situation is right.
- 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 situations, 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.



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