

Guidance on recruiting and managing volunteers

1. Equality and diversity

The University is committed to ensuring equality of access to volunteering opportunities and equality of treatment for its volunteers in all of its relevant policies and practices. No volunteer will be treated less favourably than another because of their gender, marital or civil partnership status, sexual orientation, religion or belief, racial group, age, or disability.

The University seeks to recruit volunteers from all areas of the community in order to develop a diverse volunteer-base. It is committed to developing an environment in which different ideas, abilities, and cultures are valued and where people of various backgrounds are able to participate.

Because of health and safety and insurance considerations the University does not recruit volunteers below the age of 16 years.

2. Volunteer status

Volunteers are not employees of the University and they should not be treated as such. Volunteers should be treated in accordance with the terms of the volunteer letter and the volunteer policy. The University does not intend to create legally binding relations with its volunteers.

Volunteer arrangements are by their nature flexible, the time the volunteer offers is flexible and subject to change. Volunteers have the ability to refuse tasks and to choose when to work.

Volunteers should be managed differently to employees and failure to treat volunteers in accordance with their volunteer status may create tax and legal complications.

You should take advice from Personnel Services if you have any question on this issue.

3. Recruitment

Volunteers may be recruited through advertisements on departmental websites or in newsletters, by outreach events or volunteers fairs, or through direct approaches to departments.

Sometimes members of paid staff wish to volunteer for their department or another one within the University. Care must be taken to avoid problems arising from any confusion of the two roles, or in managing any consequences of misconduct. The volunteer role should be substantially different to the paid role and departments may wish to consult Personnel Services before taking an employee as a volunteer.

Volunteers should be asked to complete an expression of interest form and attend a structured discussion. They should submit two references from non-family members who have known them for at least one year, and provide proof of their identity and address. These documents should be checked before the volunteer starts any activities. All non-EU volunteers must have a visa that permits them to volunteer whilst they are in the UK (for advice, please contact the [Staff Immigration Team](#)).

In order to comply with Data Protection requirements, departments are asked to ensure that they retain volunteer records for the [time periods](#) indicated for staff, but for no longer.

4. Additional checks

The University has a [Safeguarding Code of Practice](#), relating to those who will work with children or adults at risk, and departments and volunteers must ensure that they fully comply with this.

However, some potential volunteers may have been barred from working with children or adults at risk. It would be a criminal offence for the University to allow a barred individual to work with such a group in a regulated activity. For [regulated activity](#) with children or adults at risk DBS checks should be made through the OUSS Vetting and Screening team.

[Volunteers should not be left unsupervised](#) when they are conducting activities with children or adults at risk, unless they have been DBS checked. If volunteers have ongoing supervision by a member of staff who is in regulated activity and who has been Disclosure and Barring Service (DBS) checked, and the supervision is reasonable in all circumstances to ensure the protection of children or adults at risk, then the volunteers are not in regulated activity.

5. Volunteer letter

The volunteer letter outlines the nature and purpose of the voluntary work, once the days and the hours when the volunteer is available have been agreed. It should indicate the start date and if there is to be a settling-in or review period.

The volunteer will need to know:

- if there is an induction and if any training will be provided for the volunteer role;
- the name of someone to whom the volunteer is responsible and who will provide support;
- if they will be provided with any reimbursable expenses (incurred as part of their volunteer role) upon proof of expenditure;
- that they will be covered by the University's insurance (drivers using their cars in connection with their voluntary work must inform their own insurance company to ensure adequate and continued cover);
- that they will be treated with respect and in line with the University's policies on e.g. equal opportunities, and health and safety;
- that the department will provide appropriate facilities, equipment, and resources to enable volunteers to fulfil their roles;

The department will need assurance:

- that the volunteer will usually attend at the times agreed or inform the organisation if this is not possible; and
- that the volunteer will abide by the University's objectives and its equal opportunities, health and safety, confidentiality, conflict of interest, intellectual property, and other relevant policies.

The volunteer letter will record what information they will receive, e.g. role description, relevant policies and procedures, and a volunteer information sheet which provides guidelines for their volunteering. The volunteer letter should indicate that no contract of employment is intended, and

the expectations are binding in honour only. A copy of the volunteer letter will be kept in the volunteer's file. The volunteer role should be reviewed at least once a year with the volunteer's supervisor.

In order that the University will have ownership of any material produced by the volunteer, the volunteer, if appropriate, should be asked to sign a separate document containing an IP clause or copyright assignment.

6. Supervision and complaints

A supervisor should be appointed who will be responsible for providing regular support and supervision to the volunteer.

A review meeting between the volunteer and their appointed supervisor should be held at the end of any settling-in period to ensure that both parties are satisfied with the arrangement. It is the University's responsibility to ensure the competency of all its volunteers and the frequency, duration and format of this support, supervision, and review will be agreed between the volunteer and their supervisor.

The volunteer's supervisor will also deal with complaints about the volunteers or their work, or complaints made by volunteers. Unfortunately, some circumstances may arise where it will not be possible to continue with the volunteering arrangement. In this case the supervisor will end the volunteering placement.

7. Induction and role-related training

An induction should provide background information on the department and the University; explain any relevant procedures; describe the volunteer role in relation to the work team and outline how the volunteer will be supported. It should outline the health and safety policy, and any other policies that will relate to the volunteer, e.g. data protection, security, information security or payment of expenses, etc. The University is jointly responsible with volunteers for their health and safety. The University is committed to improving the effectiveness of volunteers. They may choose to attend any in-house training course relevant to their voluntary work, subject to the approval of their supervisor.

8. Role description

For any regular activity, volunteers should receive a role description that explains informally the knowledge and skills needed for the role, its main tasks, and the experience it will offer them.

9. University cards

At the discretion of the department and according to operational requirements, the University Card Office may issue volunteers with 'Cardholder' University cards. This will determine their access to limited IT resources via Single Sign On; provide identification; and allow access to designated buildings. Cardholder cards do not give entitlement to a mailbox on the nexus system, but they entitle volunteers to have mail delivered to their home email address. The supervisor should advise the registration team at IT Services of the volunteer's home email address so that they can set up

the routing. Cardholder cards do not entitle volunteers to discount at University retail outlets, or subsidised access to sports facilities or to make use of the University Club. In the interest of security, it is recommended that the University card should remain within the department's premises at all times.

10. Expenses

Volunteers must only receive reimbursement for out-of-pocket expenses that have been incurred as part of the volunteer role and these must be evidenced by receipts. Although it may be more convenient to offer a flat rate for transport costs, it should be remembered that any sum reimbursed over actual expenses incurred in the volunteer role may create legal and tax issues, therefore only expenses incurred in the volunteer role should be reimbursed against receipts. Volunteers should never receive payments of any nature which are in reality payment for work.

Volunteers should not be out of pocket as a result of volunteering. Typical expenses that the department may choose to reimburse upon production of receipts include:

- travel to and from the department (or wherever the voluntary work is taking place);
- travel costs incurred while volunteering;
- the cost to a volunteer of using their own vehicle for volunteer duties ([mileage rates are set centrally](#));
- meals taken while volunteering; or
- post and telephone costs involved while volunteering.

Departments are not obliged to pay expenses, but if volunteers receive nothing more than actual out-of-pocket expenses, supported by receipts, this reimbursement will not have tax implications.

If volunteers were to receive more than out-of-pocket expenses; the University would need to review their status as volunteers and complete annual notifications to HM Revenue and Customs of reimbursement payments for expenses and any other benefits. Any payments or benefits other than genuine expenses would be subject to tax and national insurance. These volunteers would also be liable for tax on any expenses given to cover travel to and from home, meals taken while volunteering, etc.

For advice on tax matters relating to volunteers please contact the [Payroll Manager](#).

11. Insurance

All approved volunteers (aged over 16) are covered by University insurance whilst they are acting on University business or engaged in their volunteer role for the department. In particular they are covered by its public liability insurance in respect of compensation claims made against them by third parties from activities arising in the course of their voluntary work.

To minimise the risk of claims, departments should provide direction and training to volunteers commensurate with activities undertaken. Volunteers must be under the direction and control of

the University at all times. Levels of supervision will depend on the competency of the volunteer and the activity involved.

It is the University's responsibility to ensure the competency of all volunteers. Regular task reviews and risk assessments should be undertaken, paying particular care to match duties with the individual's ability to perform the tasks with appropriate action being taken to refresh volunteers' skills and competencies where this is deemed necessary. Full details, including assessments, training and monitoring should be documented and easily accessible.

If a volunteer wishes to use their own vehicle for University business, as with employees, they must ensure they have appropriate business use cover on their private motor insurance. If they wish to drive a University owned vehicle or vehicle hired by the University the usual driver checks should be carried out, e.g. license and driver competence check (depending on the type of vehicle).

For advice on insurance matters relating to volunteers please contact the [Insurance Manager](#).

12. Data protection

The University has the same [data protection](#) obligation to volunteers that we have to employees and information about volunteers will be stored in accordance with the Data Protection Act 1998.

13. References

Records should be kept of the work done by volunteers, to enable their involvement to be monitored effectively. The supervisor may write references for volunteers, detailing the department, the role, and number of voluntary hours undertaken.