

VOLUNTEER CRAWLEY

Resources Pack for Small Charities and Community Groups Working with Volunteers

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Introduction

Where would we be without volunteers and the voluntary and community organisations and charities which benefit from their enthusiasm, time and expertise? June brings two national events to the voluntary sector calendar. From the 1st to the 7th, [Volunteers Week](#) celebrates the contribution made by millions of volunteers across the UK.

[Small Charity Week](#) also runs in June and celebrates and raises awareness of the essential work of the UK's small charity sector which make an invaluable contribution to the lives of millions of individuals, communities and causes across the UK and the rest of the world.

Our volunteers are precious to us and we owe them care and attention in the way we work with and support them. Volunteer Crawley has produced this resources pack for voluntary and community organisations that work with volunteers. In it you can find helpful information about managing volunteers and a list of useful sources of local and national support.

Volunteer Crawley is part of Crawley Community & Voluntary Services which provides support to volunteers and small charities in other ways: A large part of this support relates to providing routinely updated information about legal structures, policies and procedures and the financial and administrative management of voluntary organisations and charities.

Volunteer Crawley exists to promote volunteering in all its various aspects. Potential volunteers are matched with suitable vacancies in local voluntary organisations. We offer advice in areas such as good practice in recruiting volunteers or supporting volunteers with special needs to local groups. If you are interested in volunteering for a local charity (small or large), or if your charity or community organisation has volunteering opportunities, contact our Engagement Officer on 01293 657148 or email volunteering@crawleycvs.org

And through close working with the Community Development Team at Crawley Borough Council and other providers of support to the voluntary sector, we can make sure the valuable services volunteers and charities provide are publicised, championed and linked in to local networks.



Supporting Volunteers since 1959

Managing Volunteers

This section covers volunteer management, a topic often overlooked by many organisations once they have managed to involve some volunteers in their work. If care and attention isn't devoted to managing volunteers, they may become demotivated and the experience of volunteering becomes a negative one for all involved. In order to avoid this, it is important that volunteers are valued and managed properly. Below are some tips and ideas about how to effectively manage your organisation's volunteers.

Recruitment

Volunteers might be recruited because of their general interest in voluntary work or because of a specific interest in the purpose of the organisation. Perhaps the key task in recruiting new people is to actively promote the benefits (both to the individual and the organisation) of being a volunteer, stressing how volunteering can make a real and significant difference to your organisation. When advertising a volunteering opportunity, you may wish to include the following:

- The work of the organisation as a whole.
- A description of the voluntary role and the work it will entail.
- How a new volunteer can make a significant contribution to your organisation.
- How volunteering can make a difference to the community.
- Benefits of volunteering to the potential volunteer.
- How to find out more and what to do next.

This information can be used in various ways to attract new volunteers:

- [Volunteer Crawley](#) can record the opportunity on its database.
- Posters in community venues / neighbourhood parades (contact your local councillor).
- Advertises in the local newspaper or events and special occasions to get coverage from local press (including the CCVS newsletter).
- Use existing volunteers, paid staff or clients to tell their friends. Word of mouth often works well as an effective form of recruitment.
- Talks or presentations to a targeted audience such as schools, colleges, local employers, job clubs etc.

Potential volunteers may express concerns about working in situations which are unfamiliar, new, or challenging. Addressing these issues will help to clarify what is involved in volunteering and reassure people about their ability to do the work. Suggestions to deal with these concerns include:

- One-to-one discussions or informal interviews with potential volunteers as a way of finding out more about the work without making a definite commitment.
- Stress that no previous experience is necessary if this is appropriate and accurate.
- Emphasise that full training will be given before volunteers are expected to carry out any voluntary work.
- Offer a trial period that allows volunteers to try out the work without committing themselves fully.

Induction

An induction provides a good opportunity to introduce new volunteers to the organisation. Induction is an opportunity for new volunteers to ask questions about the organisation, clarify their role, and find out what is involved. A good induction should help a volunteer feel part of the organisation and begin to develop a feeling of commitment. Induction should include:

- An overview of the work of the organisation.
- Information about the aims of the project.
- The work or services involved.
- An opportunity to meet other volunteers and paid staff.

Induction can be organised in a variety of ways, including on a one-to-one or group basis. Group inductions, if there are enough volunteers and resources to do this, are particularly useful as they enable new volunteers to get to know each other, build a sense of team spirit and develop supportive relationships.

It is a good idea to put together an induction pack so that new volunteers can have all the information they need. An induction pack should include the organisation's volunteer policy, a volunteer agreement, equal opportunities policy, health and safety policy and information on claiming expenses.

Training

Having clear and simple voluntary work outlines will help in identifying training needs. A training programme can then be produced to develop the skills and qualities that are needed to carry out the work.

Volunteers should be provided with all the training they need in order to carry out their role. If the task is demanding or specialised, specific training will be required before the volunteer can carry out their tasks. There will be a need to have some specific training sessions before the volunteers can carry out their work.

It will also be helpful to identify any on-going training needs that volunteers may have so that training programmes can be developed to facilitate volunteers' progress in the organisation.

Support and Supervision

Regular opportunities for support and supervision are important and can help to identify and even prevent overload and burnout, which often results in volunteers leaving an organisation. Good supervision develops the skills of an individual volunteer and enhances the quality of service the organisation can offer. It is vital that volunteers are adequately supported in their role and that they are genuinely enabled to deal with the demands of their voluntary work. It is also important that volunteers receive regular feedback on the effectiveness of their work so that any issues can be dealt with as they arise.

The format and regularity of support and supervision will depend on the type of voluntary work people are involved in. This can be provided through one-to-one arrangements with a line manager, or a named buddy or mentor who could be a more experienced volunteer and who is available to discuss work related issues in confidence. Support and supervision could also be provided on a group basis which is often more cost effective. Group supervision has the additional benefits of enabling volunteers to experience a variety of views on the issues being discussed.

It is important that attention is given to having a supportive and safe environment for regular review meetings with volunteers.

Motivation, Retention and Recognition of Volunteers

Once volunteers are working within the organisation it is essential to maintain their motivation and enthusiasm if they are to be retained. Care must be taken to treat volunteers in such a way that they will want to stay with the organisation. Developing activities that meet volunteers' individual needs, giving recognition and appreciation of their work and celebrating a sense of achievement will promote self-esteem, strengthen commitment and develop a feeling of belonging and loyalty to the organisation. Some of the issues that volunteers face which need careful consideration include:

- Regular opportunities to learn new skills.
- Feeling a sense of personal achievement and contribution to the organisation.
- Making a difference to other people's lives, the wider community or the environment.
- Social needs and making new friends.
- Having access to new and different experiences including other forms of voluntary work.
- Receiving recognition, appreciation and thanks.

Designing volunteer roles and flexible systems that address these issues and providing volunteers with good quality induction, training and support is a complex challenge, but is increasingly expected by volunteers.

6: Further Help

For further information and support, email our Engagement Officer at [Volunteer Crawley](#) or call 01293 657148

Developing Volunteer Roles

In developing a volunteer role you need to think about:

- **What needs to be done?**
 - ✗ Don't think - "We've always had volunteers to do x, y and z so we always will."
 - ✓ Do think - "We could really improve what we do if we had a volunteer to do a, b or c."
 - ✓ Do think about skills or experience the organisation lacks.
- **Who might do it? Consider your volunteers'**
 - Skills and aptitudes.
 - Previous experience.
 - Time commitments.
- **Don't make assumptions**
 - ✓ Volunteers may have particular skills but they may want to try something new.
 - ✗ People of particular ages like particular things.
 - ✓ Different people have different ideas of boring or fulfilling tasks.
- **How important is a regular schedule?**
 - Do you really need someone to come every week for two hours?
 - What could a volunteer do for a week every 3 months, for example?
 - Would one-off for several weeks be more use?
- **What will volunteers get from the experience?**
 - A reason to leave the house.
 - A new experience.
 - Rewarding tasks.
 - Satisfaction in doing something for others.
- **Reflect people's unique skills and characteristics and offer a range of roles / tasks.**
 - Some people like variety and challenge.
 - Others like certainty and regular tasks
- **Support.**
 - ✗ Don't expect to find the volunteers you need fully formed without any investment. If you do need to give training, how can you encourage volunteers to remain for long time without contractual obligations?
 - ✓ Some volunteers might need more support than others - find roles for people's capabilities
 - ✓ Be realistic if some volunteers need more support than you actually benefit from their volunteering.
- **Provide a role description (but remember...)**
 - ✗ It is a role description NOT a job description.
 - ✗ Do not be unnecessarily prescriptive about tasks and hours - the point of volunteering is choice not compulsion - it is not a contract.
 - ✓ Agree on activities and mutual expectations.
 - ✓ Clarify what support is needed and given.
 - ✓ Define how volunteers will benefit - but make sure that it can't be regarded as pay.

No one is just a volunteer!

Volunteers should expect:

- To be treated fairly in accordance with the organisation's equal opportunities policy.
- To have a clear understanding of the tasks for which they are responsible, and to have this documented in a Volunteer Role Description.
- To receive support and supervision; to know who is responsible for them; and to have access to this person on a regular basis.
- To receive induction and training relevant to the tasks to be undertaken.
- Not to be out of pocket on account of volunteering and to understand and agree expenses such as reimbursement of travel costs.
- To have sufficient resources to enable them to carry out their tasks.
- To feel part of a team, have a voice and an opportunity to feedback.
- To be made aware of the organisation's policies and procedures and to receive any necessary guidance on implementation. *(For example, the confidentiality policy should be explained and volunteers assured that their personal information is treated in accordance with the policy).*
- To work in a safe environment, to be given the same protection as paid workers under Health & Safety regulations, and to be adequately insured.
- Not to be put under pressure to undertake work which is against their principles.

Volunteers should be expected:

- To adhere to the organisation's policies and procedures including health & safety, confidentiality and equal opportunities.
- To respect the aims and objectives of the organisation and support its ethos.
- To recognise the importance of quality of service and be committed to carrying out the tasks to the best of their ability.
- To accept and attend training.
- To attend supervision sessions.
- To be reliable, attending regularly at the time agreed and to give adequate notice of absences or any decision to leave the organisation.
- To report any problems or issues of concern to their supervisor.
- To declare any conflict of interest.
- Not to undertake any work which agency staff are being paid to do; neither should they be used to replace previously paid workers. The relationship between paid workers and volunteers should be complementary and mutually beneficial. Paid workers should be fully aware of the areas of work undertaken by volunteers and of the distinction between paid work and volunteering.

Volunteers and the Law

This section provides a brief overview of the legal issues associated with working with volunteers. There are legal obligations:

- Between the organisation and volunteers.
- That volunteers must observe in relation to service users and the general public.

Health and Safety

You must protect the health & safety of volunteers in the same way as would for any member of staff or of the public. Volunteers are also liable for the health and safety of themselves, fellow volunteers and the public.

Data Protection / Confidentiality

If you store contact details for volunteers these must be treated in accordance with the [Data Protection Act](#). Any information about personal circumstances (disability, caring responsibilities) should be treated as sensitive personal data.

Volunteer involving organisations also have a duty in relation to a volunteer's access to data, especially concerning service users. This is particularly relevant to advice agencies. Volunteers should abide by the Act, and training / induction should be provided if necessary. Volunteers should be asked to acknowledge any training / induction provided in relation to the Data Protection Act. This should mean that volunteers are aware of and do not breach the Act. In such circumstances, liability rests with the volunteer rather than the organisation.

Safeguarding

Organisations may need to carry out Disclosure and Barring Service (DBS) checks, to help them to make safer decisions on the recruitment of volunteers. A standard or enhanced DBS check is just one part of robust recruitment practice and safeguarding policy. An organisation must not carry out a DBS check unless the role is eligible. Detailed [guidance](#) is available from the Disclosure and Barring Service. A DBS check will not be needed simply because a vulnerable adult volunteers with the organisation.

Equality Act

Volunteering is not classed as employment or goods and services, so volunteers and potential volunteers cannot bring action under the Equality Act. However you should nonetheless consider how to make volunteering opportunities accessible.

Expenses

It is good practice to pay expenses but these must be genuine - additional rewards or a flat payment would be seen as pay and creates an employment situation.

Grievance and Disciplinary Procedures

You must have these for employees but they are not appropriate for volunteers - it could create an employer / employee relationship. However, volunteer involving organisations will benefit from clear procedures for dealing with volunteers who act in a discriminatory, dangerous or unlawful way. The procedure should include terminating / suspending the volunteer role where that is appropriate.

Copyright

Any designs and productions volunteers produce remain the copyright material of the volunteer. If you want to use a volunteer's copyrighted material on a regular basis, ask them to assign the copyright to the volunteer involving organisation.

Risk of the 'Accidental Employee'

There have been recent cases where volunteers (or former volunteers) have brought claims to tribunals with disputes about discrimination, bullying or the ending of their volunteering role. These have been rejected because volunteers do not have employment rights by definition. However you should take care that you do not create an employment relationship by accident.

The consequences of blurring the boundaries between volunteering and employment can be grave: Not only would people you regard as volunteers be able to claim employment rights (including bringing tribunal cases), you might also have a liability to pay minimum wage and, potentially, a back-dated tax and National Insurance bill. This could turn out to be an expensive misunderstanding.

Some common errors that lead to the creation of an employment relationship are:

- Payments of benefits / rewards beyond the re-imbusement of expenses, or that are expected.
- Formal agreements with mutual obligations

Payment

By definition volunteers are not paid and this includes payment in kind. This does not mean that they cannot be paid at all - but they must not receive a *benefit*.

Volunteers may (and for equality and good practice reasons should) be paid expenses to cover the costs of volunteering - travel, for example, or lunch where they would otherwise have it at home.

The payment should be the actual cost (or in the case of driving, the [HMRC mileage rate](#)) - a flat rate would be a benefit.

Volunteer involving organisations can also provide or pay for training if it is necessary for the volunteer's role (even though this could be described as a benefit to the volunteer). However, to offer training that is not directly relevant to the role (or a role that the volunteer could subsequently do), would be a payment in kind.

If you want volunteers to carry out tasks at events where there is an admission, then letting them in free (if it is your event) is legitimate. Likewise, paying the entrance fee for a volunteer representing your organisation at someone else's event is reasonable. But to pay for a volunteer's friend's entrance would be a payment.

It is permissible to give volunteers gifts in limited circumstances such as token Christmas presents but these should not be expensive or expected / promised on a regular basis. An annual party for all volunteers - especially as a team building event may also be acceptable, but a monthly party would not.

Mutual Obligation

Anything which implies that volunteers are compelled to do something is generally viewed as creating an employment relationship - especially if there are benefits in return. It is good practice to have a role description (not a job description) of the tasks and responsibilities expected of the volunteer which might include an indication of time. However any statement that volunteers are "**expected to**," "**required to**" or "**must do**" certain tasks or commit to very specific hours, times or length of service is likely to be seen as creating an employment situation.

The point of volunteering is choice not compulsion - volunteers give up their time of their own free will. Volunteer involving organisations might invest heavily in training or support for volunteers who they would hope to retain. Many organisations request a certain level of commitment in return. If too onerous, this may be viewed as an employment relationship (or too generous as a valuable benefit). You can explain that the training / support is costly to the organisation and outline the need to recoup costs through labour or contribution to costs - but this cannot be enforced.

Signed documents

Requiring volunteers to sign documents agreeing how often and for how long they will volunteer to do a specific task could be seen as creating an employment relationship.

However the role may require training or induction in:

- Health and safety.
- Data protection.
- Client confidentiality.
- Equality.
- Safeguarding.

It is proper that volunteers (as with staff and trustees) are asked to sign that they have received training or induction and will abide by policies and procedures. Without this the organisation may be liable for breaches of legislation committed by untrained volunteers.

Developing an Expenses Policy

Your expenses policy will probably overlap with several areas - volunteer (and staff) policies, finance and governance. You may choose to have one overall policy or you might prefer several policies covering trustees, volunteers and staff. Whether you have one policy or more than one it should meet the needs of the organisation and ensure people are not left out of pocket.

Basic principles:

- Clearly define legitimate expenses and what you will and won't refund.
- Define a clear process with appropriate paperwork and timescales.
- Expenses should generally reimburse money already spent.
- Ensure receipts and / or other evidence is used wherever possible.
- Do not make flat rate payments.
- Encourage people to claim expenses where they are entitled - it reflects the true cost of the activity.
- If people do not wish to be paid they can donate the money - this will be eligible for Gift Aid but you can't claim against the value of 'unclaimed' expenses.

What are legitimate expenses?

The Charity Commission [guidance on trustee payments and expenses](#) lists the following:

- The reasonable cost of travelling to and from trustee meetings, and on trustee business and events. This can include the cost of using public transport, taxi fares, and petrol allowances to the level permitted by HM Revenue & Customs (HMRC) before tax becomes payable.
- Reasonable refunds for the cost of meals taken while on charity business.
- Cost of reasonable overnight accommodation and subsistence (including any essential care costs) while attending trustee meetings or other essential events such as voluntary sector conferences or specialist training courses.

These are also valid expenses for staff and volunteers except: Staff can only claim for journeys *in addition to* their regular journey to and from work and *additional* meals (for example an evening meal as a result of working out of hours). It is unlikely that volunteers who are not trustees would be attending conferences etc.

Trustees may also claim the following as expenses:

- The reasonable cost of childcare, or care of other dependents (for example, an elderly parent) whilst attending trustee meetings.

- The cost of postage and telephone calls on charity business.
- The costs of a trustee's telephone rental and broadband subscription, so long as these are split to reflect the percentage of time relating to usage on behalf of the charity.
- Communication support - translating documents into Braille for a blind trustee, or into different languages; provision of alerting and listening devices, and other special aids for people with hearing impairment.
- The costs of buying training materials and publications relevant to trusteeship.
- Providing special transport, equipment or facilities for a trustee with a disability.

These would not normally be regarded as expenses for volunteers or staff as they could be described as taxable benefits or as reasonable adjustments under equality legislation (which the organisation would be expected to provide).

Where organisations do offer these to staff and volunteers as benefits or as part of a reasonable adjustment under equality legislation, care should be taken that they are reasonable, are taxed properly, and are a good use of the charities resources.

Things which are not legitimate expenses:

- Excessive / unnecessary travel costs (for example first class train fare - unless this is actually the cheapest option).
- Mileage in excess of [HMRC mileage and travel allowances](#).
- Accommodation / travel costs for spouses or partners.
- Any accommodation or subsistence which is excessive - no 5* hotels and Michelin starred restaurants.
- Private telephone calls / more than a proportion of line rental where this is not exclusively used for charity.

Things which are not strictly expenses:

- Re-imburement for goods and services paid for by trustees / staff / volunteers. This is strictly a project cost and wherever possible purchase should be made through the organisation's purchasing policy.

Things which are not strictly expenses and are also trustee / taxable benefits:

- Compensation for loss of earnings.
- Allowances (e.g. Clothing to attend functions).
- Honoraria for trustees.
- Flat rate payments to volunteers.
- Payment (rent) for use of personal property for storage of charity equipment.

In the case of trustees, these will be trustee benefits which will need authority in the governing document. Paying them without authority or permission from the Charity Commission could be a breach of trust.

For trustees, staff or volunteers, these items would be regarded as taxable benefits and, if relevant, taken into account in the calculation of welfare benefits. Compensation for loss of earning creates a fundamental shift in the nature of being a trustee or volunteer and is taxable.

Tax issues

- Genuine out of pocket expenses are not taxable.
- Where mileage is claimed this must be at the HMRC rates - any more would be taxable.

- Staff can only claim for additional journeys above travel to and from home and meals they would normally have at home - other payments (such as a season ticket for travel) is a taxable benefit. Many expenses available to trustees would be seen as taxable benefits for staff.
- Regular flat rate or per meeting payments (sometimes called Honoraria) may be taxable and potentially create employment relationships.

Writing your policy

- Decide if you will have separate policies for trustees, volunteers and staff.
- Specify which items are and are not eligible expenses. Bear in mind that the Charity Commission guidance states trustees should not be out of pocket (and neither should volunteers or staff) but also give consideration to the resources you have.
- Estimate the likely cost of expenses and budget for this - large charities have to report on how much they pay in trustee expenses.
- Whilst you shouldn't make flat rate payments, you might set a maximum rate for a single claim - the average cost of a sandwich locally or a return bus journey, for example.
- Determine your process - remember, it needs to be robust but not over bureaucratic:
 - Will there be a regular time to claim expenses (e.g. first of the month) or will they be claimed as they arise?
 - Will you have a deadline for making claims?
 - How are expenses paid, in cash or by cheque? Volunteers may prefer cash for each session but trustees by cheque at committee meetings.
 - What is the maximum allowable cash payment?
 - How do you make sure the claim is legitimate and has evidence? Specify the evidence required for each type of claim (such as tickets for travel, booking forms etc).
 - Do claims need to be authorised by a line manager /volunteer manager before they are submitted?
 - Who is responsible for processing claims?
 - How quickly will people be reimbursed?
 - Will you allow advance payments for specific items?
- Develop a claim form that reflects the information you need.
- Bear in mind some people may need to be reimbursed more urgently than others.
- Encourage people to claim (they can donate the payment later if they wish to) and what they can and can't claim for.
- Make sure people know they must keep receipts / evidence. Where you are covering costs of trustee's phone calls or postage ask for an itemised bill.
- Review the policy / process regularly to make sure people claim equally - that everyone who is entitled to does so, and no-one unfairly claims more than they should.
- Contents of the policy:
 - Statement of principle
 - Eligible expenses
 - Process
 - Evidence
 - Timescales
 - Dates agreed and reviewed.

Resources for Volunteer Involving Organisations

- [Volunteer Crawley](#) exists to promote volunteering in all its forms, volunteers are recruited and matched with vacancies in local voluntary organisations. Our Engagement Officer can advise on good practice in the recruitment, development and retention of volunteers or help you consider the responsibilities and rewards of volunteering.

📍 1-2 Gleneagles Court, Brighton Road, Crawley, West Sussex, RH10 6AD.

☎ 01293 65714

✉ volunteering@crawleycvcs.org

Opening Hours

09:30 to 16:00 on Tuesday, Wednesday, Thursday

Volunteering advice sessions are held regularly at Crawley Library and Crawley Town Hall. The dates are listed at <http://www.crawleycvcs.org/volunteer.php>

- [Crawley Community & Voluntary Service](#) is an independent charity that offers advice, information, help and support to local charities and voluntary and community groups. We provide a wide variety of information about starting and running voluntary organisation or community group, writing a constitution, whether you need to register as a charity, financial procedures and much more.

📍 1-2 Gleneagles Court, Brighton Road, Crawley, West Sussex, RH10 6AD.

☎ 01293 657000

✉ info@crawleycvcs.org



facebook.com/Crawleycvcs



twitter.com/crawleycvcs

- [Volunteering England](#) (now part of the National Council for Voluntary Organisations) is the national infrastructure agency for volunteering. Committed to supporting, enabling and celebrating volunteering, Volunteering England provides a range of [resources](#) and [information sheets](#).

📍 Society Building

8 All Saints Street

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☎ 020 7713 6161

✉ ncvo@ncvo-vol.org.uk



facebook.com/volunteeringengland



twitter.com/volunteeringeng



[ivo.org/volunteeringengland](https://invo.org/volunteeringengland)



youtube.com/user/VolunteeringEngland

- The [National Council for Voluntary Organisations](#) provides advice, support, training and events to voluntary and community sector organisations. The [Managing Volunteers](#) section provides an overview of key issues in managing volunteers.

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[@NCVO](#)



[NCVO's Facebook page](#)



[NCVO LinkedIn group](#)

- The [Disclosure and Barring Service](#) has replaced the Criminal Records Bureau and the Independent Safeguarding Authority. [Age UK Horsham District](#) is a registered umbrella body with the DBS and can process applications for voluntary and community organisations working with children and vulnerable adults.
- [West Sussex Skillshare](#) is a free initiative designed to provide bite-sized volunteering opportunities of between one and ten days to students, professionals and businesses. The idea is that good volunteering opportunities should be more easily available to those who want to help their community or charity, but can't promise a long commitment or regular hours.
- The [National Occupational Standards for Managing Volunteers](#) set out the skills that staff and volunteers who manage volunteers in their organisation should have, as well as what they should know and understand, in order to do their job well. NCVO Workforce Development developed the National Occupational Standards for the Management of Volunteers, which define the whole spectrum of activities involved in the management of volunteers and will help you to carry out this role effectively.

Crawley Community & Voluntary Service is an independent charity supported by Crawley Borough Council and West Sussex County Council



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