

What's happening?

The charity starts with a grant of £200.

It spends £170 so has £30 remaining.

It spends £50 and goes into deficit minus - £20

It waits until the Fun Day before spending any more.

The Cashflow Surplus is a plus figure.

The Cashflow Deficit is a minus figure.

Receipts minus payments will equal

your Cashflow Surplus or Deficit

Your opening Cash Balance is the amount you have at the start of the month, your closing Cash Balance the amount you have at the end.

Although you will make a surplus of £225 in a year, watch out for the months that you go into deficit.

Although you have only made a surplus of £25, you have still carried out your beneficial activities, helping people.

Cashflow Forecast											
Month:	Pre-Start	Aug	Sept	Oct	Nov	Dec	Jan	Add months...	Totals		
Income - Money In = Receipts											
Fun Day						475			475		
Grants	200								200		
Sales e.g. promotional goods									0		
Donations, etc.						50			50		
Total Receipts	200	0	0	0	0	525	0	0	725		
Expenditure - Money Out = Payments											
Equipment		100							100		
Volunteer Expenses						8	12		20		
Training and development									0		
Event costs, including Fun day						205			205		
Telephone		50							50		
Insurance							55		55		
Stationery		20							20		
Marketing and/or Communication			50						50		
Other									0		
Total Payments	0	£170	50	0	0	213	67	0	500		
Cashflow Surplus/Deficit (-)	0	-£170	-£50	£0	£0	£312	-£67	0	225		
Opening Cash Balance	200	£30	£30	£-20	£-20	-£20	£292	0	200		
Closing Cash Balance	200	£30	-£20	£-20	-£20	£292	£225	0	225		

Section 5 People

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Checklist

Step 1 Recruit good staff and volunteers

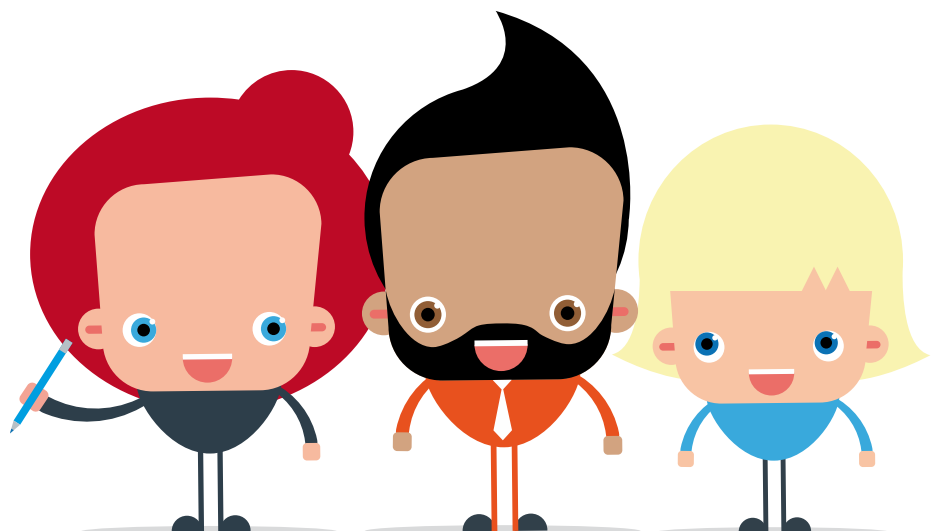
	Yes or No?	Actions we need to take	Completed on (date)
We have recruited using the recruitment checklist			

Step 2 Create an induction programme. Look after your volunteers

We have:	Yes or No?	Actions we need to take	Completed on (date)
A volunteer agreement			
An induction programme for staff and volunteers			

Step 3 Use people management tools

	Yes or No?	Actions we need to take	Completed on (date)
We have support and supervision meetings			
All staff and volunteers use a personal folder to record their progress and achievements			
All staff and volunteers have a yearly review or appraisal			



Step 1 Recruit good staff and volunteers

To make a difference to your community, you naturally need people to do the job.

People work - sometime known as Human Resources or HR - covers everything to do with people directly doing a job or tasks for your group, including your volunteers, employees, Committee members, Trustees and/ or Directors.

Your staff and volunteers are essential to your success. Managing them well is an important skill. You can serve your community better and meet your aims if you help your staff and volunteers so that they are happy, keen and using their skills properly. You must also be aware of, and stay within, the law. You have particular responsibilities if you are an employer.

How do I recruit or involve the best people?

Here is a checklist so that you know what you do and don't need to do. The list looks long but everything is included for a good reason, including safeguarding, page 12 and equalities. For more information on equalities contact any of the support organisations on page 54 and ask for the Quick Guide to Equality and Diversity.

Once you have tried this process it will become more straightforward the next time. Following the steps should make it more likely to find people and keep them for longer.

This checklist is suitable for paid staff or volunteers but we have put in a * where you don't usually need this for volunteers. It up to you to decide how this checklist should be changed to make it as useful as possible for your group.

Checklist

1 Identify the job that needs doing

- Job title
- List the tasks the staff member or volunteer will be expected to do when they join (**Job description**)
- List their experience, knowledge and skills needed (**Person specification**)*

2 Prepare an application form and information letter

An **application form** allows you to easily compare the people who apply (applicants) so you can decide who to select (shortlist) for interview.

Your form should include space for the applicant to write or type in:

- ✓ **Person's identity** - name, contact details
- ✓ **Education and Qualifications***
- ✓ **Experience - previous work or volunteering**
- ✓ **How they fit the person specification***
- ✓ **Outside interests**
- ✓ **References** - NOTE: do not contact current employers without your applicant's permission.
- ✓ **Equal Opportunities Monitoring Form** This is a separate form that the applicant can choose to fill in if they wish. You use it to make sure you are advertising properly and getting applicants from all backgrounds. Your group cannot use this to make decisions about whether to employ someone or not because of their background (**discrimination**) - by law you are expected to choose the best person for the job.

You should also include guidelines on how to complete the application form (by focusing upon matching experience and skills to the person specification), who and where to send it to, the deadline, and interview dates so that the applicant can keep them free*.

Create the right impression about being a good group to work with - make sure your form is well-presented and easy to understand and complete.

3 Let people know the job is available

Advertise where you know the people you want will look - e.g. community newsletters, email news from networks, flyers in community venues, specialist places.

A one page advert should include:

- ✓ **Job title.**
- ✓ Short details of **your group or organisation.**
- ✓ **Main tasks** - from the job description.
- ✓ **Length of contract, hours, pay** (if applicable), **working location.**
- ✓ Main **experience, knowledge** and **skills needed** - from the person specification*.
- ✓ Any **benefits of the job** e.g. flexible hours*.

- ✓ **DBS check** (formerly CRB) will be carried out if this is necessary for this post, see below.
- ✓ **References** will be taken and **Proof of Qualifications** may be needed.
- ✓ Commitment to **Equal Opportunities** good practice.
- ✓ **How to apply** - where the applicant can get the forms and where they need to be sent back to.

A good advert sells your organisation and helps applicants know whether this is a suitable role to apply for, saving time on unsuitable applications.

4 Shortlist

At least two people should choose the people who you think best meet the **person specification** and who you want to interview. You can score 0-5 on the basis of what you see written - the evidence
For volunteers, you may simply invite them in for a discussion about what they would like to offer and which roles they might be involved with. You probably won't do a formal interview.

5 Formal Interview

- Select the interview panel and agree dates for interview
- Interviews may include interview questions, presentations, 'Meet the team', written exercises and/or role play. Prepare the paperwork in advance. Make sure you know how you will score each part so that it gives you the right information to help you decide which applicant is best for the job.

6 Disclosure and Barring Service (DBS)

This was the Criminal Records Bureau (CRB). You use this to assess whether your applicants are likely to be able to work with your groups safely. If a person has a criminal record, you cannot just exclude them but have to think about how relevant the offence is to the work they are applying to do. Not all roles require a DBS check, check the website for details.

7 References and Proof of Qualifications

A request for a reference can ask for confirmation of the dates of employment, the applicant's abilities and particular skills. Do not ask for personal information or for gossip about the applicant.

8 Contract

- Paid staff are offered a contract, but let them know that this is on the condition that DBS checks and References are acceptable. You need to supply the written Terms and Conditions of Employment within two months
- Volunteers do not have a contract but you can use a **Volunteer Agreement**. You still need to check their DBS and references before they start and make provision for their health and safety.

Complete a checklist of what you need to do



Step 2 Create an Induction Programme. Look after your volunteers

Create an Induction Programme

If you help new staff and volunteers settle in they are more likely to understand what is important to you and your values from day one, start doing their job quicker and better, and stay with you for longer.

You can create an **induction programme**. Adapt the following to your needs. Tick when you have everything in place ready to start

Checklist - Induction Programme

- Induction meeting
 - Explain your group's history, purpose, what is important (values), services and products.
 - Explain what the job tasks are.
 - Explain what the other team jobs are and where their role fits in.
 - Provide a copy of your policies and explain the key points
 - Include safeguarding - how to protect children and vulnerable adults from harm.
- Tour of the office and facilities.
- Tour of the neighbourhood or key places.
- Meet the team - more formally at a meeting or informally at a social event
- Meet the Committee
- Meet your key partners and supporters so they can explain their roles.

Tips - Induction Programme

- ✓ **Keep information simple and relevant** - not too much too soon, to avoid overwhelming the new staff member or volunteer.
- ✓ **Provide handouts** so that they don't have to remember everything in one go. Some groups have a Staff Handbook or Folder.
- ✓ **Involve your team** - this helps communication.
- ✓ **Manage expectations** - be careful - it is possible you can oversell the job at your induction.

Look after your volunteers

A volunteer gives their time and skills for free to help you with achieving your aims. The only money they receive is their out-of-pocket expenses agreed with you beforehand e.g. bus fares.

Volunteers are not employees, so there will be no contract of employment. However, you will naturally want to look after your volunteers. You do have a duty of care that is the same as for paid staff, for example, with health and safety matters.

One aspect of looking after volunteers is setting up a **volunteer agreement**. It saves time and potential worry on both sides if you and your volunteers understand what you expect from one another. List what you will do for your volunteer, then list what you would like to see from your volunteer.

Try setting up a volunteer agreement by using the template at on the WVSC website - [Policies and Procedures section](#) . Remember to add or delete the bullet points so that it says what you will actually do.

Other things that your group can do:

- list the jobs the volunteer does - a **volunteer role description**
- introduce your organisation - make a volunteer welcome pack or handbook
- be clear on the rules - write a **volunteer policy**, page 50

Step 3 Use people management tools

All staff and volunteers need support and supervision, so they have an opportunity to give and receive feedback.

Supervision is when another chosen and responsible person makes sure that the work is allocated and done correctly and can help with questions and problems.

Useful tools are:

- **Peer support** - support from someone who is doing similar work to the new person. This person can answer questions and talk through any issues. This is a good way of recognising the expertise of your experienced staff and volunteers.
- **Mentoring** - support from someone, possibly outside the organisation, who brings greater experience or knowledge to share.
- **Meetings** - a chance for all volunteers to input into the work of your group as well as share their experiences together.
- A **personal folder** to store their job lists, group information, personal achievements, training certificates etc.
- A **yearly review** to celebrate achievements and think about next steps.

For volunteers - don't forget to allow for different levels of help, treating everyone as an individual. Ask what support they need or explain the support available, rather than judging in advance. Some volunteers may need a little extra training on the job. Others may lack confidence and need reassurance that they are doing things correctly.

Do's and don'ts of supervision

Do...

- ✓ **arrange a private space** - so you both can speak freely.
- ✓ **ask open questions** - what has gone well? What hasn't gone so well?
- ✓ **encourage people to raise problems or concerns** – they are much easier to deal with early before they get too large.
- ✓ **discuss training opportunities** relevant to the job that they do and other opportunities within your group.
- ✓ **give clear feedback**, including praise.

Don't...

- ✗ **make it feel like a 'grilling' or 'telling off'** - listen as well as talk. This should be a positive experience for you both.
- ✗ **be afraid to raise issues** - make the issue into a shared problem, not something personal - "What steps do we need to take to improve?"

This section is adapted from [Volunteering England](#). You can search their 'Good Practice Bank' using the keyword supervision to find more information.

Appraisal

Paid staff may have a yearly meeting to discuss their progress against their job description and day-to-day tasks and will put in place actions to improve. This is known as an appraisal. It covers:

- ✓ Achievements over the year. Have the targets been met?
- ✓ Reasons achieving or not achieving targets - could anything have been done differently?
- ✓ Setting new targets
- ✓ Support needed from the organisation to achieve these targets and any training and development agreed