LINCOLNSHIRE FAMILY HISTORY SOCIETY

Volunteer Management Policy

Incorporating a Volunteer Sign-off Form

Background

The Charity Commission and the National Council for Voluntary Organisations (NCVO) emphasize that while volunteers are not employees, having a formal policy protects both the charity and the individuals.

For the Lincolnshire Family History Society, this policy serves as a vital tool to clarify boundaries. It ensures that branch coordinators, data indexers, and help-desk teams understand their roles, know how to claim out-of-pocket expenses (like printing or travel), and remain protected under our Society's insurance.

1. Statement of Intent

The Lincolnshire Family History Society (LFHS) is run entirely by volunteers. Our mission to preserve regional archives and support family history research relies completely on the dedication of our members. This policy ensures that all volunteers - whether serving on the Executive Committee, running local branches (Bourne, Great Grimsby and Lincoln), or staffing the Lincoln Resource Centre - are supported, valued, and treated fairly.

2. Status of Volunteers

Volunteers are essential to the Society, but volunteering does not create a legally binding contract of employment. There is no intention to create an employment relationship either now or in the future.

3. Recruitment and Induction

- **Inclusivity**: Volunteering opportunities are open to all members regardless of age, background, or skill level.
- **Role Clarity:** Every volunteer will be given a clear, written explanation of their tasks (e.g. Resource Centre Steward, Branch Secretary, Transcription Indexer).
- **Induction:** New volunteers will receive an informal induction from a current role holder, committee member or other designated person, covering building safety, fire exits, and data protection rules.

4. Support and Problem Solving

- **Day-to-Day Contact:** Every volunteer will have a designated point of contact (usually the Branch Coordinator or a specific Trustee) to answer questions and offer support.
- **Resolving Issues:** If a volunteer is unhappy with an aspect of their role, or if the Society has concerns about a volunteer's conduct, the matter will be discussed informally and constructively in private to find a mutually satisfactory solution.

5. Financial Expenses

- **Out-of-Pocket Reimbursement**: Volunteers should not be out of pocket due to their service. The Society will reimburse reasonable, pre-approved expenses (such as authorised printing, stationery, or postage for branch operations).

- **Claims Process:** All claims must be submitted to the Treasurer using the standard LFHS Expense Claim Form (or an agreed alternative), backed by valid receipts or proof of purchase.

6. Health, Safety, and Insurance

- **Duty of Care:** LFHS will provide a safe environment for all volunteers. Volunteers must follow the Society's Risk Management and Health & Safety guidelines at all physical venues.
- **Insurance Cover:** Registered volunteers are fully covered by the Society's Public Liability and Employers' Liability insurance policies while carrying out officially approved tasks.

7. Confidentiality and Data Protection (GDPR)

- Member Privacy: In the course of their duties, some volunteers may have access to member contact details or subscription records.
- Data Rule: Volunteers must keep all personal information strictly confidential. Member data must never be shared, downloaded to unsecured personal devices, or used for non-society purposes.

8. Review Process

This policy will be reviewed annually to ensure it continues to reflect best practices in volunteer management. The policy will be reviewed by the Executive Committee at its first meeting following the Annual General Meeting. The Executive Committee may review and amend this policy at any time if changes in legislation, Charity Commission guidance, best practice, or the Society's circumstances make this necessary. The date of the most recent review will be recorded in the Committee minutes.

Approved by the Executive Committee: 24 September 2026
Last reviewed: No reviews to date
Chairman: Colin Ashworth
Next review: First Committee meeting following the 2027 AGM

Volunteer Sign-Off Form

Background

A Volunteer Sign-Off Form (sometimes called a Volunteer Agreement) is not a legal contract. Its purpose is to give our volunteers a summary of what they can expect from the Lincolnshire Family History Society, and to get their written confirmation that they have read and agreed to follow the Society's core policies (like Data Protection/GDPR, Safeguarding, and Volunteer Management).

Having this signed form on file protects our Trustees if a volunteer accidentally leaks member data or breaches a safety rule, because it proves the Society did its duty to inform them.

The Form is to be found Overleaf/….

Volunteer Sign-Off Form

Thank you for offering your time and skills to support the Lincolnshire Family History Society (LFHS). We appreciate your dedication to helping others discover their roots.

What you can expect from LFHS:

- A friendly, safe, and supportive volunteering environment.
- A clear explanation of your role and tasks.
- Reimbursement for pre-approved out-of-pocket expenses (with receipts).
- Insurance coverage while performing authorized tasks for the Society.

LFHS expects you will

- perform your volunteering tasks to the best of your ability;
- follow the Society's safety guidelines at our Resource Centre and branches;
- keep all member information private and follow our data protection rules.

Volunteer Declaration and Sign-Off
By signing below, I confirm that:

1. I have received, read, and understood the LFHS Volunteer Management Policy and the Safeguarding Policy.
2. I agree to keep all member personal data (such as emails, phone numbers, and addresses) strictly confidential and will not share it outside the Society.
3. I understand that this agreement is a statement of values and intent and does not create a legally binding contract of employment.

LFHS Volunteer Role: _____

Volunteer Name (Printed): _____

Volunteer ('wet') signature: _____

Date: _____ / _____ / 20___

Please return this completed and signed form to your Role Coordinator or scan email it to the LFHS Chairman. A copy will be held securely on file.