



## Introduction

Community woodland groups (CWGs) across Scotland rely on voluntary effort to deliver benefits for their community. Effective volunteer management is essential for the success of these organisations. This information note outlines considerations for working with volunteers within the context of community woodland groups in Scotland.

There is no one typical community woodland group and a massive diversity of people who volunteer; there is no one 'best' way to work with volunteers. The challenge is to find the way that works best for you. This note is intended to help you find that way by highlighting some areas to think about.

This is a huge topic, if it interests you, we recommend you follow up with the references and links (page 12). We also recommend that you take the time to think right through the process and what is required before doing anything else. Little worse for a person turning up to volunteer, for example to plant trees and find not enough spades available or work cancelled or changed as there is no insurance in place.

This information note is necessarily brief but will be revised in time. The resources listed (page 12) go into further detail on a range of related topics. If you see errors, corrections, omissions or points you'd like to add then please let us know.

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## What is volunteering and who are volunteers?

What?

**Volunteering is the act of willingly offering one's time, skills, and efforts without monetary compensation to contribute to a cause, organisation, or community, driven by a sense of altruism and a desire to make a positive impact.**

A volunteer, therefore, is an individual who willingly and freely offers their time, skills, and services to support a cause, organisation, or community without receiving financial compensation.

Volunteers have a wide range of motivations but contribution to a cause, organisation, community or what they see as positive change are all important. There are almost always personal reasons at play also: "desire to meet people," "want to do something out of doors" etc. Consequentially, there is no single 'type' of person who comes forward as a volunteer. Understanding peoples' motivations allows creation of a connection between them and your project so it is worthwhile spending some time to understand your volunteers.

There are many opinions about how volunteers should be regarded. What policies, procedures, guidance apply? Should they be insured separately to staff? Most if not all these questions are resolved by regarding volunteers as unpaid staff subject to the same policies, procedures and guidance, eligible for the same insurance coverage and respected as people making a valuable contribution to your organisation. So rather than having, say a staff handbook and a volunteer handbook, have one document that applies to both, with specific sections where required. Recognise though that volunteers may not be quite as motivated to read such documents as employed staff; making information as succinct as possible will help.

Whatever you decide in terms of policy it is important to recognise that volunteers often work alongside paid staff doing the same or similar work for no financial reward and do so willingly. They also have the ability in most cases to leave at any time, without notice. This combination requires the volunteer manager to always be very aware of motivations and commitment levels. For this reason many experienced volunteer managers believe that managing volunteers is different to managing employees.

## Why work with volunteers?



**In February 2024 most CWA member community woodland groups have no employed staff.** Volunteering and working with volunteers is the only way things happen on the ground, the only way that communities deliver for themselves. So, for most of our members engaging with their community through volunteering is vital to their work.

Volunteers increase the capacity of organisations to get things done, so from the perspective of delivering outcomes working with volunteers can only be a good thing.

And it is more than that, offering volunteer opportunities gets the wider community involved, allows a sense of ownership beyond the governing group or committee and volunteers bring enthusiasm and fun to projects that are important aspects of success and generating wider community cohesion.

In addition, volunteers also benefit. Some will gain most from health or companionship others will most enjoy the sense of looking at completed work, and others will gain employability skills and experience or even jobs because they have volunteered. All are valuable and all are part of the reason to offer volunteer opportunities.

## Understanding your organisation



**Being clear about the purpose, focus, and work of your community woodland group is vital to attracting committed volunteers. Begin with a mission statement that clearly communicates the organisation's core values and objectives. If you are focussing on volunteers from your local geographic area, then mention of the benefits you are working toward delivering for the community is also likely to be important.**

Outline the specific goals and projects your group is currently engaged in, emphasizing their relevance to your purposes as a community group. Use communications appropriate to your situation that illustrates the impact of volunteers' contributions in a way that gives their work meaning.

By creating a sense of purpose and meaning around your work and revisiting that over time you make it easy for people to see how they can contribute which in turn may ease recruitment and retention. To do this you need to have a clear understanding of what your organisation is about.

## What work is suitable for volunteers?



**Millions of people across society volunteer in a massive variety of roles. People handle cash, deal with the public, prepare budgets and financial accounts, carry out fundraising, communications and media work, complete biological monitoring, keep records and archives, undertake care work, plant trees, fell trees, build and maintain footpaths; the list is endless. The opportunity for your group to engage people is equally diverse.**

Volunteers in community woodland groups can usually help with tasks like planting trees, maintaining footpaths, community engagement, promoting opportunities and more. Activities should align with your group's goals, contribute to your objectives and crucially, be safe for the individual volunteer. Insurance covering the activity needs to be in place beforehand and appropriate risk assessments should be completed.

Some tasks may require the use of power tools and you may be lucky enough to have someone volunteer with the right skills and experience to do those tasks. It is for you to decide whether you are comfortable with volunteers using power tools and other specialised equipment or practices. In addition to other factors, you will need to pay particular attention to insurance and risk management and have the right insurance and the right processes in place before work commences.

In principle there is no reason why volunteers cannot undertake work such as chain saw or machinery use, or chemical application if dealing with invasive non-native species. Such tasks do bring additional considerations. Where qualifications are normally required for example to use a chainsaw or apply certain chemicals, you should record that you have seen certificates.

## Special considerations



**Volunteers are just that: volunteers.** So, whilst you may choose to treat them like employed staff in terms of recruitment, policies etc, they may not adhere to punctuality, dress code or anything else to the same degree that staff might. It is for you to decide on the degree of flexibility you wish to offer in all areas and what steps to take if attendance or behaviour is different to your wishes and expectations.

This may depend on your organisations' reasons for offering volunteering opportunities in the first place. Whether you are trying to complete a one-off piece of work or recruit for long-term volunteers does make a difference to the processes and steps you need to consider.



## Understanding the volunteer



**Every person, every volunteer is different.** People commit time and effort for a wide range of reasons. Do all you can to make the objectives and purposes of your group meaningful and attractive and recognise that people will still come for their own reasons which may or may not match your purposes. For example, you may be managing woodland to increase biodiversity and people may come along for the opportunity to do something physical out of doors. Recognising however, that their efforts contribute to bigger goals can be an important part of the reward that volunteers get from their time and may evolve to motivating them to keep coming back.

Offering a diverse range of opportunities according to your circumstances and in line with your purpose as an organisation increases the likelihood of recruiting volunteers.



**As an existing community woodland group, you will likely have come together through a volunteer effort, at least initially. So, you will have some understanding of what works to recruit volunteers in your area. More of the same may be a good starting point to increase your pool of volunteers.**

You may however look at additional advertising, social media, other community events, local schools (if the work is appropriate for young people), or businesses.

You can advertise for volunteers without specifying a particular role or you can promote a particular role or task that you need support to achieve. Both approaches have merit and disadvantages. A general call for support has potential to engage a wider audience. An advert specifically for someone to run your social media accounts is likely to appeal to a more limited pool of people. One advert with several specific roles may work too.

If you are looking to achieve a specific task it may be worth preparing a written outline, similar to a job description that describes the task and the likely time commitment.

Some organisations mimic staff recruitment to recruit volunteers, including application forms, interviews, terms and conditions, grievance and disciplinary procedures, health and safety guidelines and so on.

This may or may not be appropriate to your circumstances, but one option if you have staff and wish to go down this route is to state that policies applicable to staff also apply to volunteers. This negates the need for different but similar policies that relate to staff and volunteers.

Most organisations that have no staff will not go to this degree of process, but it is worth offering clarity on what task is being offered and what time expectation you have of volunteers, does the task you have in mind need finished to a deadline? Is it a time limited opportunity? Is there flexibility in what time of day it may be done?

Communicating this to potential volunteers could be a simple conversation or perhaps adequate description in your advertising for example: work on Tuesday in the woodlands will involve Rhododendron clearance from 9am to 4pm. This does depend on the opportunity you are offering, one day of practical site work requires different information to an open-ended opportunity to manage your website.

One aspect especially worth considering is expenses, are you willing and able to reimburse expenses volunteers incur for example travel or food? Some financial planning may be required before making this decision, however being clear about this in your recruitment is important. Also important is consistency, if you decide to offer expenses it should likely be available to everybody. Covering childcare costs to enable parents to attend may be an exception to this.

As with staff, recruitment of volunteers is vitally important; invest a little time in thinking about what skills you are looking for, what people need to know before committing, how it contributes to the purposes of your organisation and make your communication clear and accurate, and the result is more likely to be good people committed to a task they understand to offer a valuable contribution.

Communication will be important throughout recruitment, there will undoubtedly be questions. Responding quickly and clearly, developing good relationships with the potential volunteer can only help the perception of your organisation and increase the likelihood of people committing time.



**So, you have volunteers recruited what now? Importantly you should have thought about this question before people turn up ready to go to work!**

Be prepared for the additional pair(s) of hands, have the right equipment in place and take time to introduce volunteers to the organisation, people, task and so on. First contact with the volunteer is important and following from the above comment about treating volunteers similarly to staff, some organisations have a relatively formal induction process.

You may have a range of measures of success in terms of tasks achieved by the volunteer, but everything depends on the person wishing to come back and first contact influences this.

There are several strategies to manage and retain volunteers:

- Relate your management to individual motivations. For some who are committed to the purposes of the organisation this will be relatively straightforward for others, perhaps someone looking to gain experience to enhance employability they may be less interested in the work and more interested in acquiring content for their CV.
- Recognise and respect that for some their return will depend more on social or other reasons than on the task you are asking them to complete.
- Effective communication: keep people informed and engaged and try to develop a sense of connection, perhaps especially if the volunteer is new to your organisation.
- Flexibility: where possible be flexible and offer opportunities for people to get involved at different times of day or week.
- Invest in training and support for volunteers appropriate to the role they are doing. In time, perhaps more experienced volunteers can mentor or guide newer volunteers. It is not unusual for organisations where individuals have volunteered for some time to provide formal training courses, which may be both incentive and reward.
- If you have a group of volunteers, foster a sense of community amongst them. Celebrate achievements and create a supportive environment where people feel valued and connected to each other and the organisation.
- Say thank you. Some people shun recognition, others like their contribution recognised. It is vital however to thank people for their contribution and this may take the form of certificates, awards or other tokens of appreciation.



**For a whole variety of reasons people will cease to volunteer for you no matter how dedicated or enthusiastic; people move on.**

Expect this and plan for it, especially if you have volunteers who, for example manage your website or some other long-term piece of work. Build a relationship where people are comfortable telling you their plans, so you have notice and somebody leaving isn't an awkward surprise.

If your volunteer opportunities are day long practical events then perhaps it is not so difficult if someone doesn't return, but useful nonetheless to know in advance if an experienced volunteer is not returning.

At the very least a person ceasing to be involved deserves a simple thank you. If the departing volunteer has been involved for a long time you may wish to offer more and there is a whole range of options from chocolate, mention in newsletter or on social media or combination. While it may not be your wish that someone leaves it is an opportunity to appreciate someone and if appropriate celebrate their contribution to your organisation's work which may also be an opportunity to talk about your organisation and work publicly.





**Whether you are offering 2-hour slots to volunteer, day or weekend events you will need some way of knowing who is coming.**

This should be clear and convenient both for booking and if necessary to withdraw from an event. This can be done by simple paper lists or increasingly online systems such as Cervis may be used. Online systems also have the benefit of advertising the opportunities. Two examples are linked in the resources section below.

At some point usually before a volunteer joins, so perhaps in the booking, it is wise to collect information about any relevant prior medical conditions. This information should be treated confidentially. People are often reticent about revealing personal information about themselves so do not be surprised if something later comes to light that you might have hoped would be declared in advance. Whilst it is important to be inclusive, it is for you to decide if by declaring a prior condition people make themselves ineligible to be involved.

## General Data Protection Regulation (GDPR)



**The law on GDPR tells organisations what to do when collecting, storing and using personal data, it applies to any organisation that collects, stores or uses personal data. If you collect people's names, addresses, phone numbers for any purpose, for example when taking their booking to volunteer for a day, it applies to you.**

People's personal information (address/phone number etc) should always be treated confidentially. The GDPR also introduced a requirement that organisations need explicit permission from everyone to be able to send them communications of any kind. This needs to be active and it should be recorded and retained and importantly acted on: if someone doesn't respond or says no to communications from your organisation, you should remove their email address from your mailing list.

GDPR gives individuals rights over their data, this is usually dealt with by provision of a privacy notice examples of which are linked below.

More information on GDPR in the resources (page 12).





**For most community woodland groups, practical work in woodlands probably in groups will be an important part of the volunteer experience. You have a duty of care that any opportunity you offer is safe for the volunteer and that requires thought and planning.**

The Conservation Volunteers (TCV) have decades of experience completing practical tasks in the countryside with volunteers, including woodlands and other habitats. Their publications are second to none for this type of volunteering and we recommend them as an expert resource.

Health and safety is a vital consideration when thinking about completing practical tasks with volunteers, especially when it involves use of tools for example removing invasive non-native species or building or maintaining footpaths.

Preparing or revising Risk Assessments is one of the first steps to take when thinking about work that needs completed. These are documents that enable you to consider and mitigate reasonably foreseeable risks. An essential planning tool that when completed and followed serve to improve safety on site. Example generic risk assessments are linked below.

If providing or using tools those tools should be in good condition, appropriate to the task at hand, safe to use and used safely. Volunteers should receive instruction in using tools that includes, use, transport, maintenance, storages, safe working distances and in some cases sharpening.

Edged tools (bill hooks, axes etc) may have particular considerations with some potential volunteers. You may for example give school age children spades for tree planting but perhaps not axes or billhooks. This is up to you, if through risk assessment you conclude any risks of giving tools to young people can be mitigated then you may choose to do so. But if after doing a risk assessment you conclude risks cannot be mitigated then you would likely be unwise to go ahead.

Provision of first aid and qualified person on a work site is important. Even with the best risk assessment, careful practice and responsible people, incidents will happen. Having the right skills and equipment available to respond quickly is an important part of keeping people safe.



Something to consider is whether your group should provide Personal Protective Equipment (PPE) to volunteers for practical work. Examples might include, gloves, eye protection, steel toe cap boots, waterproofs, and safety helmets. This has cost implications which should be considered prior to committing to the work taking place. People can be asked to bring their own but whilst it may be reasonable to ask people to bring for example, sturdy footwear it is perhaps less reasonable to ask for steel toe capped boots, but it does depend on the work at hand and your group also.

Be guided again by your risk assessment, if in that process you conclude for example that helmets are required for everybody on site when trees are being felled then, either everyone has a helmet, or the work doesn't take place. Or perhaps a divided site is possible with only those with a helmet permitted in certain areas.

People will come to practical tasks with a wide range of prior skills and experience. Some for example, will be very comfortable using bowsaws to fell small trees, others less so. Whilst encouraging skills development and progression, allowing people to work within their comfort zone, both in terms of tool use and task they undertake will further encourage a safe environment.

Messaging around health and safety is also sensitive, its importance should be reinforced without creating fear, generally people should feel safe as well as be safe. And whilst it is likely that there will be one person on site responsible for achieving the task and looking after people, including health and safety, it is worth reminding people that everybody on site can look out for everybody else on site and contribute to safety. Part of this is keeping the site (relatively) tidy with tools not in current use in a safe place, trip hazards minimised and so on. Everybody can contribute to this.

## Catering on site



**People will need to eat and drink if on a work site for any length of time. Whether you are providing or asking people to bring their own will need thought and clarity of communication.**

If you are providing food and drink, then this brings considerations of dietary preference, hygiene and health and safety, especially if using a stove of any sort to provide warm food or drink. Fewer considerations come with providing biscuits to go with drinks people bring themselves.

Most groups are likely to ask volunteers to bring their own supplies, but coming together at breaks and meals as well as being a social moment, can be a good way of ensuring everybody is comfortable with the work, their tools, the environment and so on.

Perhaps provision of a group meal is an occasional opportunity to thank people for their efforts.

## Diversity and inclusion



**Volunteers are as diverse as the population from which they are drawn. Embracing diversity and fostering inclusion are essential contributors to a vibrant and effective volunteer group.**

Being inclusive involves actively cultivating an environment in which people from different backgrounds feel welcome, valued, respected and empowered to contribute as they wish. Promoting an inclusive culture, celebrating differences and encouraging a broad range of talents, ideas and insights will strengthen your group, increase capacity and contribute to you delivering benefits for all the community.

## Disclosures and Protection of Vulnerable Groups (PVG)



**Disclosure Scotland offers different types of criminal disclosure including the PVG scheme, all of which are intended to keep people you work with safe.**

CWGs may be involved with working with children or with protected adults, both types of work are regulated under the PVG scheme. People, including volunteers who work with children or protected adults must become members of the PVG scheme.

This takes time and if you think necessary for prospective volunteers to enter this process that time needs considered in your planning and some organisations make this appointment to volunteer roles subject to successful completion of appropriate disclosure process.

Further information from Volunteer Scotland, there is a fee waiver in place for volunteers, disclosures required for staff incur a fee.

## If things go wrong



**The best way to deal with a problem is to address them as soon as possible.** The sooner things are dealt with the better and an early conversation may go a long way to heading off a more difficult situation later. At the very least early conversations provide full understanding which can better inform later actions. This may also prevent you losing a volunteer who otherwise might have ceased their involvement.

Occasionally you may find you need a way of resolving issues and concerns so that volunteers continue to be involved in a constructive way. It is important to have a process of some sort in place before you need it, any difficult situation that arises will be further complicated if you are simultaneously looking around for guidance on what to do and how to do it. It might be as simple as everybody knowing that if a volunteer is unhappy about something they can talk confidentially to a named board member, but you need to have this in place in advance of need.



### **Record keeping provides a whole range of benefits for your organisation:**

- a vital management tool informing future practice. If you know how many trees get planted in a day with 10 volunteers you have an information to inform future works.
- a measure of impact for funders of your work. Be careful to plan the information you record so that it matches with any requirements from funders.
- a record of community engagement
- allows you to know who you may contact
- a note of who was completing practical work on which days.
- a note of pre-existing medical conditions which may require consideration.
- a note of consent to be included in photographs for publication in newsletters, social media or websites.
- showing actions taken in the case of an accident, this will often take the form of an official accident recording book frequently provided with first aid kits.
- and in difficult situations evidence of conversations and actions taken and hopefully never needed.

Except where statute requires record keeping (for example, PVG, accident reporting, GDPR) it is up to you what level of detail you wish to collect and keep and for how long.

Some organisations deal with some of this through a 'consent' form for volunteers, which covers for example medical conditions, consent to be in photographs and willingness to receive further information.

## Conclusion



**At its heart volunteering is about giving something to a cause, enabling that allows groups to deliver more for their community, supports personal development for the volunteers and for many groups is simply the way things get done.**

**The benefits far outweigh any downside of organisation or setting up systems and once established many things mentioned above can be in place for years to come, allowing focus on the important thing: giving people opportunity to be involved.**

## Acknowledgements



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## Resources



**CWA is a resource for members on any aspect of their activity. Contact us and we'll do what we can. This may be advice or signposting to other sources or simply talking through an issue you are facing.**

**Community Woodland Association [www.communitywoods.org](http://www.communitywoods.org)**

Volunteer Scotland [Home - Volunteer Scotland](#)

TCV [The Conservation Volunteers in Scotland | Connecting People and Green Spaces \(tcv.org.uk\)](#)

TCV Handbooks [The Handbooks - TCV Practical Conservation Handbooks](#) 10 titles available digitally for a small subscription, including Woodland and separately Tree Planting & Aftercare.

Scottish Council of Voluntary Organisations (SCVO) [Volunteers - SCVO](#)

Volunteer Wiki [VolunteerWiki - The go-to place for volunteer involving organisations](#)

Volunteering Victoria (Australia) [Volunteering Victoria - State Peak for Volunteering](#)

### **Example online volunteer booking systems**

[Volunteering Opportunities - Cairngorms National Park Authority](#)

[Volunteering – Cormonachan Woodlands \(cormonachan-woodlands.co.uk\)](#)

### **Example generic risk assessments**

[CWA-RA-002-Generic\\_Planned\\_Events++Rev\\_0\\_Final.pdf \(squarespace.com\)](#)

### **GDPR**

[Privacy Policy — Community Woodlands Association \(communitywoods.org\)](#)

[A Sample Privacy Notice - VolunteerWiki](#)