



Voluntary Arts Ireland
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Voluntar Airts Airlann



Department of
**Culture, Arts
and Leisure**
www.dcalni.gov.uk

Arts & Volunteering

A practical Toolkit for arts
organisations and groups
seeking to involve volunteers

May 2012



Foreword

Volunteer Now and Voluntary Arts Ireland would like to acknowledge the work of Volunteering England and Voluntary Arts England in developing the original arts and volunteering Toolkit.

In adapting this publication for a specifically Northern Irish audience, Volunteer Now and Voluntary Arts Ireland are providing a resource to help arts organisations involve volunteers first of all as they prepare for the City of Culture in 2013 and then as they develop their volunteer programmes in the future.

The need for this publication has been identified through various pieces of research into volunteering in the arts sector in Northern Ireland which have showed a need for arts organisations to develop their volunteer recruitment and involvement processes.

We hope this Toolkit will provide the practical advice groups need either to start involving volunteers or to improve their volunteer management. Further support and training is available from Volunteer Now and Voluntary Arts Ireland at the contact details below.



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1 Introduction

1.1. What is a volunteer?

Volunteering is defined within the Volunteering Strategy for Northern Ireland as

‘..the commitment of time and energy, for the benefit of society and the community, the environment, or individuals outside (or in addition to) one’s immediate family. It is unpaid and undertaken freely and by choice.’¹

This definition refers to both formal volunteering (carried out with, or under the auspices of an organisation/group) and informal volunteering (carried out outside the organisation, often at neighbourhood level but outside, or in addition to, the immediate family).

‘Volunteering’ therefore refers to a wide spectrum of activities. Overall, anyone who donates their time freely in order to benefit others, whether that is within an organisation or more informally within their neighbourhood is a volunteer.

Volunteers that are involved in the arts carry out tasks such as those listed below:

1. Committee volunteers: those who serve on boards of management;
2. Organising volunteers: those who co-ordinate the work of volunteers;
3. Service volunteers: those who contribute to the running of an organisation or group;
4. Process volunteers: those who direct, shape and lead the artistic work of an organisation or group, e.g. directors, conductors, producers, choreographers, designers, tutors, curators, conservators, promoters, tour guides, etc.

1.2. Member or Volunteer?

Some arts organisations may understand ‘volunteer recruitment’ as finding more members, audience members or participants. The nature of the arts sector and the fluidity in terms of how people engage with it means that individuals often are members, participants and volunteers. Below is a list of common roles that people play within voluntary arts

Member: someone who belongs to an organisation / group.

Audience member: someone who benefits from the artistic output of an organisation / group.

Participant: someone who takes part in the activities of an organisation / group.

Volunteer: someone who freely offers to do something for an organisation / group.

This distinction is less clear in the arts sector than in others, as our members, audience members and participants are often the people who do things for or with us. It’s still worth bearing in mind though, because the way you approach someone to

¹ Department of Social Development (2012) Join In, Get Involved, Build a Better Future. A Volunteering Strategy and Action Plan for Northern Ireland, <http://www.volunteernow.co.uk/supporting-organisations/volunteering-strategy>

fulfil a volunteering function will be different to the way you approach a standard member, audience member or participant.
 This table may help you to be clear whether you are asking someone to be a member, volunteer or both

| You are asking someone to... | Member | Volunteer |
|---|---------------|------------------|
| Join the organisation | √ | x |
| Join the organisation and do something that benefits others | √ | √ |
| Do something that benefits others | x | √ |

2 Recruiting volunteers

There are lots of reasons for recruiting volunteers, which may include some of those which are listed below:

- Generate new energy, ideas and approaches;
- Want to make your organisation more attractive to funders;
- Need more people to carry out roles (e.g. fundraising); or
- Want to offer more activities or meet a new need in the community.

Whatever your reasons, before you begin you should do some planning. How much you do will depend on your organisation and its activities, but the principles are the same for everyone.

2.1. What do you want volunteers to do?

Unlike members, volunteers are recruited specifically to do something. Therefore, the first question you need to ask is what you are recruiting them to do:

- If your work involves paid staff, think practically about tasks that staff currently don't have time to do or about what support they might need to add value to their work;
- Think adventurously about dream projects which your organisation doesn't have the resources to tackle;
- Think realistically about what an individual volunteer or group of volunteers could achieve;
- Think sympathetically about what might interest a potential volunteer and benefit their personal development.

Once you know what you want volunteers to do, you can start to write role descriptions. These lay out the specific tasks/ activities a particular volunteer will undertake. When developing any documents for volunteers, including role descriptions, volunteer policy or complaints procedure it is best to steer clear of employment related terminology in order to avoid implying a contract of employment. Employment rights come with a contract of employment. More information on

volunteering and the law is available from the [Legal Issues and Volunteering](#) section of Volunteer Now's Volunteer Management publications.²

You can find more information on developing recruitment flyers and role descriptions by going to the recruitment section of Volunteer Now's Volunteer Management publications.³ Further guidance and support is also available through Voluntary Arts Ireland's dedicated online resource [Running Your Group](#) (sign-up required).

2.2. What support will you offer?

All volunteers require support and organisation with respect to their involvement. The degree or structure and support that is provided will depend on a number of key factors, including the type of tasks that they are doing, the frequency of their involvement, the length of time they have been carrying out their role and their individual needs.

When considering volunteer involvement it can be useful to consider four key areas of volunteer management, they are induction, role descriptions, support and supervision and training.

Induction

The level of induction required will depend on the type of role and the frequency of involvement. Someone who is involved on a regular basis carrying out a relatively complex role may require more background information or training before they are able to start carrying out a role compared to someone who is involved in one off, occasional or bite sized amounts of volunteering with you.

Role description

It is useful for everyone who is volunteering to have a clear idea of what they are being asked to do. Taking time to list down the duties for different roles is also a useful way for organisers to reflect on what they are asking people to do and how this affects other aspects of support, such as how support and supervision will be provided and if training should be offered.

Support and Supervision

The type of support and supervision offered will be dependent on the type of tasks volunteers are carrying out and how often they are involved. If someone is involved in a one off capacity, for example stewarding at a local festival, appropriate support and supervision would involve making sure they have access to an organiser, leader or buddy during the event and an individual or group debrief at the end.

Training

The type of training that is made available to volunteers will depend on the required level of skill needed to carry out the role safely and effectively. There may be some forms of training that you think are very important and will make them mandatory

2

<http://www.volunteernow.co.uk/publications/?category=13&type=44&Search.x=60&Search.y=12>

3

<http://www.volunteernow.co.uk/publications/?category=13&type=36&Search.x=51&Search.y=19>

induction training, in other instances people may come with existing experience and skills that mean they do not need training. Training can range from informal 'on-the-job' training / shadowing existing volunteers to an organisation paying for an external trainer to come and offer training to the group. Consider what skills and experience your existing volunteers have that could be of use to your group. For example, is there scope to develop your presence on the web; is there someone in your existing volunteer base that could provide a short training session on how to do this?

This toolkit provides further guidance on induction, training and support and supervision of volunteer with the arts sector in section 5 and 6.

You can find more information on best practice across these areas by going to the [Volunteer Management section](#) of Volunteer Now's website.⁴ Further guidance and support is also available through Voluntary Arts Ireland's dedicated online resource [Running Your Group](#) (sign-up required).

2.3 How will you select?

For some volunteering, selection can be very informal, and focus on an introductory chat about the work and the potential volunteer's interests. If the role has some degree of responsibility, however – such as working with people, money or dangerous equipment – selection procedures should be more thorough. [Recent research](#) with the 50 and over age group has found that use of formal language to describe recruitment procedures can act as a barrier to some,⁵ this may be a more general concern, so you may think about using alternative language to describe selection procedures i.e. informal chat rather than interview. It does not mean your procedures are any less thorough!

Key elements of selection can include:

- Application Forms / Registration Forms;
- References;
- Interviews / Informal chats;
- Criminal Record Checks (where volunteers are working with 'vulnerable groups' and meet criteria set out under the Safeguarding Vulnerable Groups (NI) Order).

You can find more information about selection and all aspects of the volunteer recruitment process from the [recruitment section](#) of Volunteer Now's Volunteer Management publications.⁶ Further guidance and support is also available through Voluntary Arts Ireland's dedicated online resource [Running Your Group](#) (sign-up required).

2.4. Finding volunteers

There are many ways of finding volunteers and it will differ from area to area, but there are some key things to consider.

⁴ <http://www.volunteernow.co.uk/supporting-organisations/publications>

⁵ <http://volunteernow.co.uk/fs/doc/publications/making-the-connection-2-report-email-version.doc>

⁶ <http://www.volunteernow.co.uk/publications/?category=13&type=36&Search.x=51&Search.y=19>

Volunteer Now

Volunteer Now is a regional to local organisation which provides support and expertise to volunteer involving organisations, volunteers and members of the public across Northern Ireland. Volunteer Now can help with the design of volunteer roles, advertise them on the NI database of volunteering opportunities available from www.volunteernow.co.uk and match people with organisations that are looking for the skills and qualities they are offering. More information about Volunteer Now, what they do and to find the office closest to you, go to www.volunteernow.co.uk

Local / Publicity

You can produce posters and leaflets and even advertise for volunteers in your local paper. One of the best ways of doing this is by telling the story of your existing volunteers and using this to promote the need for more people to support your cause. Carrying out a short satisfaction survey with your volunteers can provide you with statistics that you can use on flyers to show how happy and fulfilled your volunteers are. For example *“98% of our volunteers say they would recommend volunteering with us to others!”*

To help get you started here are 5 suggestions:

1. Tell your members and their connections
2. Post on your social media platforms
3. Put an advert on your website
4. Inform your local volunteer centre
5. Ask information providers to carry your ad e.g. Volunteer Now and Voluntary Arts Ireland's e-news

3 Retaining volunteers

Although it's not always possible (or desirable) to keep the same volunteers for a long period of time, it's worth looking at what you can do to reduce the turnover of volunteers in your organisation. After all, you've already gone through the process of recruiting, inducting, training and supporting the volunteers. In addition, when they leave they may take a wealth of knowledge and experience with them.

If you follow the guidance in this toolkit you should be on your way to creating a volunteer programme that people want to stay involved with. However, some of the most important elements are included here.

3.1 Create rewarding roles

You should build retention into your volunteer programme before you even begin recruitment by creating roles that are attractive and rewarding, as well as meet your objectives. When drawing up a role or task description consider what you need and want the volunteer to do.

What is there in the role that would attract and keep volunteers? Is it a chance to learn new skills or meet new people? And what does the role have to offer a volunteer in the medium to long term?

A Volunteer Corps for Art Events / Festivals

If there are a number of voluntary groups located around the same geographic area, think about organising a core group of volunteers from across the groups who are centrally trained in specific skills, e.g. event based skills such as stewarding, and who are willing and able to provide additional support to any venue holding an event. A memorandum of understanding could be developed across the participating groups, agreeing to provide a basic level of support which includes reimbursement of expenses etc for volunteers helping at their event. The agreement should also state that the event organisers are responsible for insurance for the volunteers while they are engaged in their venue or event.

3.2 Be aware of motivations

Being aware of a volunteer's motivations is useful because it can help you plan the volunteer's journey during their time with your organisation and ensure you meet their needs as well as your own. An informal chat at the recruitment stage can be a helpful way of discovering a person's motivations for wanting to volunteer with you.

Motivations may include

- Learning new skills;
- Using existing skills;
- Desire to address a specific problem in the community;
- Having fun;
- Feeling useful;
- Getting out of the house;
- Making new friends;
- Gaining experience that may help with future employment

Remember too that motivations can change over time, which makes ongoing communication with your volunteers very important.

3.3 Support and supervision

Providing good quality support and supervision helps to retain volunteers by

- Helping you identify problems and solutions early;
- Ensuring you know how they're feeling about the role;
- Identifying external issues that may impact on their volunteering; and
- Making them feel valued.

This can be as simple as regularly chatting to volunteers to make sure they are happy with what they are doing and enjoying their role. For some roles it can be appropriate to have more structured support and supervision sessions. The support framework required will be determined by the nature of the role and the individual's needs. One off volunteering roles usually require a different type of support to a volunteer doing more regular and intensive work with vulnerable clients.

3.4 Reward and recognition

Volunteers are more likely to stay with you if they feel they are an important part of the organisation. There are many ways of doing this, and different people value different forms of recognition, so you'll need to think about your own situation and volunteers, but some suggestions are:

- Involve volunteers in discussion and decision making;
- Hold your own celebration events and /or join regional celebrations such as:
 - [Voluntary Arts Week](#) in May
 - [Volunteers Week 1-7 June](#)
 - [International Volunteer Day](#) (5 December);
 - Enter the [Epic Awards](#)⁷
 - Joining regional schemes such as [Millennium Volunteers](#)⁸
- Group lunches or coffee mornings;
- Provide certificates after a certain length of service or at the completion of a project;
- Formal accreditation, e.g. NVQ's;
- Identify opportunities to offer people more responsibility;
- Ask longer term volunteers to mentor or buddy new volunteers; and
- Remember to say 'thank you'.

Gifts

Some organisations like to reward their volunteers with gifts. This is okay as a 'one-off', but any regular gift could be seen as payment, which you want to avoid as it could confer employment rights on the person you are calling a volunteer.

The rule of thumb is that a volunteer should not be rewarded with anything that either represents a cost to the organisation or that the volunteer could use to make a profit. This isn't to say that an organisation can't reward their volunteers with gifts when they leave or after many years of service, but these should be small, such as flowers or chocolates.

3.5 Exit interviews

Whatever you do, volunteers will leave. When they do, exit interviews are useful for finding out why and evaluating their experience as a whole. This will help you to think about your volunteer programme and how to develop it.

Volunteer Now have developed an [Exit Questionnaire](#)⁹, which you could use to get feedback from volunteers leaving your organisation, it could also be used as the basis for a meeting.

⁷ <http://www.epic.co.uk/contact.html>

⁸ <http://youngcitizens.volunteernow.co.uk/millennium-volunteers>

⁹ <http://volunteernow.co.uk/fs/doc/publications/volunteer-exit-questionnaire.doc>

4 Equality and diversity

There are many benefits to working with a more diverse group of volunteers, including:

- Demonstrating an organisation's commitment to equal opportunity for all;
- Organisations can always benefit from fresh approaches;
- Incorporating a wider range of ideas might help your organisation to improve its service and work more efficiently to fulfil its aims; and
- Reflecting the local community can boost an organisation's credibility and improve its ability to focus on local needs.

There are a number of information sheets that focus on encouraging diversity in volunteering from the [Encouraging Diversity](#)¹⁰ section of Volunteer Now's volunteer management publications. There are tips and guides to involving specific groups, some of which can be underrepresented with organisations or groups i.e. ethnic minority groups, children / young people, people with disabilities and older people.

Involving Children (under 14 yrs old) and Young People as Volunteers

It is up to you to decide which aspects of your organisation are appropriate for children and young people to get involved in, group activities often work best. Have an open mind and remember children are often quick to learn and older children will be keen to take on new responsibilities. A child protection policy should be drawn up and everyone should be clear that involving children as volunteers means following the guidelines for working with children and young people. Volunteer Now has a number of resources that focus on this area, including the involving [Children and Volunteering checklist](#) and [Young People and Volunteering checklist](#).

Family Volunteering

Family volunteering is a useful model of volunteering in which family members of all ages can volunteer together as a group. It provides an intergenerational feel to a voluntary groups work. Although all groups that involve volunteers should have good child protection practices in place, involving families in your work can mean that parents or guardians of young people can be asked to be responsible for their own children while at the event / venue.

Older People

Older people can bring a lot of skills and experience to the organisation / group which they have built up over a lifetime. Volunteer Now has developed a good practice checklist for organisations [involving older people \(50+\)](#) as volunteers.¹¹ This checklist is based on research carried out with volunteers and non volunteers aged 50+ in Northern Ireland.

¹⁰

<http://www.volunteernow.co.uk/publications/?category=13&type=25&Search.x=40&Search.y=19>

¹¹ <http://volunteernow.co.uk/fs/doc/publications/older-people-and-volunteering-checklist-nl.pdf>

4.1 Policy

It's a good idea to have an equality and diversity statement or policy that covers volunteers. At its simplest, this could involve a statement within the volunteer policy or volunteer handbook that the group or organisation will not discriminate directly or indirectly on the basis of differences other than suitability for the role.

As well as saying what it won't do, an equality and diversity statement / policy should state how the group or organisation will aim to create an inclusive environment, including positive action. Positive action involves encouraging less well represented groups, for example the black, gay or disabled members of the community, to volunteer.

4.2 Be aware of potential barriers

Remember, ensuring everyone has an equal opportunity to participate in your activity doesn't mean just thinking about people who are disabled. People can be excluded by things such as their financial situation, the time available to them and their childcare responsibilities.

Some of the things you might want to think about include:-

- Physical accessibility of the venue or location;
- Requirements of the role, such as time commitment;
- Whether you can cover expenses;
- If you can provide childcare or cover the cost;
- Does a role require a volunteer to be AccessNI checked?
- Is involvement in your group or organisation restricted to a particular group of people e.g. women? Is this still relevant or necessary?
- What image does your organisation give off through flyers, information leaflets?

4.3 More information

You can find more information in terms of how to monitor equality and diversity in volunteering opportunities by going to the [equality and diversity section](#) of Volunteer Now's Volunteer Management publications.¹² Further guidance and support is also available through Voluntary Arts Ireland's dedicated online resource [Running Your Group](#) (sign-up required).

5 Induction and training

The purpose of induction and training is to ensure that volunteers are able to carry out their role as effectively as possible.

¹² <http://volunteernow.co.uk/fs/doc/publications/monitoring-diversity-and-equality-of-opportunity-in-volunteering1.pdf>

5.1 Induction

Induction introduces new volunteers to the organisation and their role in it. You may want to consider putting together an induction pack that contains most of the information. You might also send this to anyone who enquires about, or shows an interest in, your group or organisation.

Pre-arrival

This forms part of the recruitment process, and will consist of any information about the organisation and the role that you send the volunteer before they start with you, such as

- About the organisation and what it does;
- Volunteer role description(s); and
- Contact details and directions and/or map of how to get there.

Organisational induction

Explaining what the organisation's goals are, and how it goes about achieving them, and helping the volunteers understand where they fit within the organisation as a whole. You might include

- Background/history of the organisation;
- Mission statement;
- Arts activities provided and audience/participant groups;
- Organisation chart; and
- Talks from paid staff and established volunteers about their roles in relation to volunteers and the organisation as a whole.

Local induction

Ensuring that volunteers have a clear understanding of their role and how they will carry it out, as well as site-specific information and guidance on support and supervision mechanisms, such as

- Health and safety issues, e.g. first aid procedures, accident reporting, policy on smoking, emergency exits and evacuation procedures;
- Financial issues, e.g. how to claim expenses (and what can be claimed);
- Volunteer agreement (what the volunteer can expect from the organisation, and vice versa);
- Arrangements for support and supervision, including if appropriate allocating a key member of staff, or another volunteer as a mentor or buddy;
- Problem-solving procedures (e.g. grievance/complaints);
- Training programme/training needs identification process; and
- Relevant policies, e.g. confidentiality, data protection, phone/internet use.

Group v. Individual Induction

The way you approach the induction process will depend on a number of factors, including the number of volunteers you have starting at the same time and the amount of space you have for group activities.

Group induction can take less time overall, and allows for discussions to take place where appropriate. It can also enable volunteers to start to build relationships and provide a support system for each other.

On the other hand, if you only have volunteers starting from time to time, it might put them off if they have to wait a while for enough others to join and form a group, so it could be as well to start people one at a time.

Some things might be covered more effectively in a group context, such as confidentiality for example, and you may choose to wait and deal with that as part of a specific training session when you have more people to contribute to the discussion.

5.2 Training

The training your volunteers receive will depend entirely on their roles, and on the numbers of volunteers you need to train at any one time. Initial training may be required to enable the volunteer to carry out their role effectively, and depending on the role may take hours, days or weeks to complete. Ongoing or refresher training may also be required to keep volunteers skills fresh, or to enable them to develop within the organisation and to take on further tasks.

However you decide to address your volunteers training needs, the key is to make sure that it is designed around their roles. Current volunteers can be extremely useful in helping identify the elements in which they feel some formal training would be useful, and they will be able to feed in examples of situations that could form interesting case studies for discussion. Experienced volunteers might even find it interesting to deliver, or at least co-deliver, elements of a training programme for new volunteers.

On-the-job training

The most common way of training volunteers and probably the most economical is on-the-job training. This is most appropriate if you only take on one volunteer at a time, and the work they will be doing is relatively straightforward.

A member of staff, or another volunteer, will show the volunteer how to do a task and then supervise them as they do it. This method is effective as long as the person doing the training takes care to make sure the new volunteer really understands what they are meant to be doing, and the volunteer feels able to ask questions.

External trainers

A second method is to send volunteers on a training course with a trainer from outside the organisation. This can work either with groups or individual volunteers, as you can either send one or two people on a public open course, or book the trainer to do the course purely for your organisation.

This can be an expensive way to buy training, but it's worth it if your volunteers need to learn some more complex skills. You can also make it more economical, if you are buying the training in, by letting other local organisations participate, and sharing the cost that way.

In-house training

Another method of delivering training is to develop an in-house programme. This works best if you can take on volunteers in groups and you need to train them in fairly complex tasks or ideas.

There are lots of good training the trainer courses out there, too, to enable the people delivering the training to keep up to date on current thinking about learning styles and training techniques. Volunteer Now offers this kind of training; more information is available from the [Training and Standards](#)¹³ section of their website. Voluntary Arts Ireland also offers capacity building support to voluntary arts groups through its [Running Your Group](#) service. Alongside a range of online resources field officers visit groups directly to help them with specific needs. To find out more contact them at <mailto:info@vairland.org>

5.3 More information

You can find more information on these issues from the [Induction and Training Section](#) of Volunteer Now's Volunteer Management Publications.¹⁴

6 Support and supervision

All volunteers need support and supervision, but the form that this takes will vary. Volunteers at a one off event will need different support to a long term volunteer.

What is important is that it is appropriate to the role and the individual volunteer. Don't prejudge what support someone might need - ask them. Some people may need a little extra training or on the job coaching. Other volunteers may lack confidence, and need reassurance that they are doing things correctly.

6.1 Peer support

It's worth considering peer support. This could be through a buddying system, in which experienced volunteers support new ones. As well as providing support for new volunteers a buddying system is a good way of recognising the expertise of experienced volunteers.

Another option is volunteer meetings. These are a chance for volunteers to collectively contribute to the work and daily life of an organisation, and a chance for them to share their experiences.

6.2 Supervision meetings

One-to-one supervision meetings may not be appropriate for all models of volunteer involvement, but for many volunteers it is a good way of ensuring they have a chance to give and receive feedback.

Avoid it being seen as an 'appraisal'. Reassure volunteers that it's a chance to talk in a private space, and that it's as much about you listening to the volunteer as you talking to them.

¹³ <http://www.volunteernow.co.uk/training-and-standards>

¹⁴ <http://www.volunteernow.co.uk/publications>

Questions to ask include:

- What's going well?
- What isn't going well?
- Are there any other tasks you would like to do?
- Do you feel there is any support or training you need?

Encourage volunteers to raise problems or concerns. It's much easier to deal with a problem at an early stage than let it grow into something which disrupts the work of the volunteer or even the whole volunteering programme.

Give clear feedback. Make sure you let volunteers know when you are pleased with their work. Where there are problems related to the volunteers work or behaviour don't be afraid to raise them. Always remember that the problem is the behaviour not the individual, and phrase the issue as a shared problem.

6.3 Other models

Where regular formal supervision meetings are not appropriate to your involvement of volunteers, you should consider finding other ways of sharing and receiving feedback. The above questions are still likely to be a useful base for such conversations, but of course they may need to be adapted to the situation.

When involving volunteers in a one day project, you may simply need to chat to everyone involved and make sure they are happy with the training they received and understand what they are doing.

6.4 More information

You can find more information in Volunteer Now's Managing and Motivating publication. This is available from the [Support and Supervision](#) Section of the Volunteer Management publications.¹⁵ Further guidance and support is also available through Voluntary Arts Ireland's dedicated online resource [Running Your Group](#) (sign-up required).

7 Expenses

Whilst unpaid, volunteering shouldn't leave volunteers out of pocket, otherwise it can be difficult to involve a diverse range of people. That's why it's good practice to reimburse a volunteer for all the out of pocket expenses they incur, where possible. Furthermore by only returning expenses it ensures you don't inadvertently grant employment rights or lead to people making a 'profit' which are tax deductible by HMRC.

Whilst this should be a straightforward matter, there are a number of pieces of good practice guidance which can help. This includes asking volunteers to complete an expenses claim form and provide copies of receipts. An [information sheet](#) providing

¹⁵ <http://volunteernow.co.uk/fs/doc/publications/as-good-as-they-give-workbook-3-managing-and-motivating-volunteers.pdf>

relevant guidelines on reimbursement of out of pocket expenses to volunteers is available from Volunteer Now's website.¹⁶

7.1 Be open and honest

The most important thing is to be open and honest with your volunteers from the start. Be clear about what expenses will and won't be reimbursed. Be clear about limits on the amount that can be claimed for expenses such as meals. They will then be able to make an informed decision about their volunteering.

7.2 Why reimburse expenses?

By ensuring that no volunteer is out-of-pocket due to their volunteering, a group or organisation will be increasing the potential number of volunteers that might support it.

Expecting volunteers to cover their own expenses could be a barrier to people with low incomes or little spare cash. It could also deter people who feel that they are already making a significant contribution of their time.

Refunding volunteer expenses is a legitimate financial element of any volunteer programme, so groups and organisations should take account of potential volunteer expenses in funding applications and budgets.

7.3 Which expenses should be reimbursed?

In general any reasonable expense incurred as part of the volunteering activity should be reimbursed. This includes but is not limited to

Travel, including to and from the place of volunteering;

- Meals and refreshments;
- Care of dependants, including children;
- Equipment such as protective clothing; and
- Administration costs such as postage, phone calls and stationery.

What is 'reasonable'?

Some expenses will be necessary and have a set cost, such as protective clothing and stationery. However, it may be worth considering buying these items centrally and distributing them to volunteers if possible.

For expenses such as meals and refreshments, it may be useful to set a limit. Many organisations do this so it's worth checking to see what others in your area do, or what general local costs are in the local area.

7.4 How to reimburse expenses

The process of reimbursing expenses should be based on a single, simple principle: only reimburse actual out-of-pocket expenses. This means volunteers submitting receipts that show what they have had to spend as a volunteer that they otherwise wouldn't have.

¹⁶ <http://volunteernow.co.uk/fs/doc/publications/volunteers-and-expenses-information-sheet-nl.pdf>

Be volunteer friendly

Be clear about what expenses will and won't be reimbursed. Be clear about limits on the amount that can be claimed for expenses such as meals.

Try to reimburse expenses as soon as possible. Try and reimburse in cash or by bank transfer rather than by cheque as this can often be inconvenient and delay payment.

It's okay to provide expenses payments in advance, as long as receipts are provided once the money has been spent and any remainder is returned. This can be particularly helpful for volunteers with a low income who may find it difficult to cover expenses upfront but needs to be closely managed.

If the group or organisation can only process expenses claimed within a certain timeframe after incurred it should ensure volunteers know this so they do not miss the deadline.

Develop a simple volunteer expenses claim form. A sample can be found in the [Expenses section](#) of Volunteer Now's Volunteer Management publications.¹⁷

People who are in receipt of social security benefits

Sometimes people that are interested in volunteering with you may be in receipt of a social security benefit such as job seekers allowance or employment and support allowance. It is perfectly ok for benefit claimants to volunteer as long as they continue to meet the conditions of their benefits.

As well as meeting the specific conditions around their social security benefit, there are a number of basic rules that apply across all benefits:

- The person should only be receiving genuine out of pocket expenses;
- It is considered 'reasonable' for an organisation not to pay the individual a wage for the role they are doing;
- Inform the social security office that they are carrying out their volunteering;
- Inform the social security office if they receive any benefits in kind (e.g. honorarium);
- Able to attend a work focused interview or medical assessment when asked.

An information sheet on volunteering and benefits is available from the [Legal Issues](#)¹⁸ section of Volunteer Now's volunteer management publications.

Encourage all volunteers to claim expenses

Some volunteers may feel that they do not need or even should not be offered expenses payments. However, ensuring everyone claims expenses helps a group or organisation to determine the full cost of a volunteer project. This will help in forecasting volunteer budgets and applying for appropriate funding.

¹⁷ <http://volunteernow.co.uk/fs/doc/publications/sample-of-expenses-claim-form-volunteers.xls>

¹⁸ <http://volunteernow.co.uk/fs/doc/publications/volunteering-and-social-security-benefits-nl.doc>

If a volunteer really doesn't want to have their expenses reimbursed it is possible to set up a scheme whereby they donate these unclaimed expenses back to the group or organisation along with [Gift Aid](#).¹⁹ Guidance is available on [the HM Revenue and Customs \(HMRC\) website](#).²⁰

Do not pay a flat rate

Volunteers should not be paid a flat rate for the following reasons:

- Any money given to a volunteer over and above out-of-pocket expenses is regarded as income by HMRC and would render the entire payment liable for tax, not just the portion above the actual expense;
- It could affect payments if the volunteer is in receipt of state or other benefits; and
- It could be regarded by an employment tribunal or similar body as contributing to the formation of a contract between the volunteer and the organisation, leading to a volunteer being granted the same rights as employees, including the national minimum wage.

It should be noted that there have been cases in which HMRC has decided that flat rate payments are earnings and demanded several years' tax be paid on them.

7.5 More information

You can find more information from the [expenses section](#) of Volunteer Now's Volunteer Management publications.²¹ Further guidance and support is also available through Voluntary Arts Ireland's dedicated online resource [Running Your Group](#) (sign-up required).

8 Health and safety

The legal obligations of organisations towards their volunteers with regard to health and safety are less clear than they are for employees. Nevertheless, organisations do have legal obligations towards their volunteers, and it is good practice to treat volunteers with equal consideration when it comes to health and safety.

8.1 The duty of care

In law, an individual may be owed a duty of care by another to ensure that they do not suffer any unreasonable harm or loss as a result of the latter's activity.

The [Health and Safety at Work \(NI\) Order 1978](#) enforces a common law 'duty of care' which is a general legal duty on both individuals and organisations to avoid carelessly causing personal injury or damage to property.

¹⁹ <http://www.hmrc.gov.uk/individuals/giving/gift-aid.htm>

²⁰ http://www.hmrc.gov.uk/charities/gift_aid/rules/vol-expenses.htm#1

²¹ <http://volunteernow.co.uk/fs/doc/publications/volunteers-and-expenses-information-sheet-nl.pdf>

Generally, a duty of care arises where one individual or group undertakes an activity which could reasonably harm another, either physically, mentally, or economically. If such a duty is found to be breached, a legal liability may be imposed to compensate the victim for any losses they incur.

A duty of care can arise in many ways which may not always be obvious, for example:

- Loaning equipment to others;
- Charity walks and sponsored runs;
- Running fetes or fairs;
- Organising day trips; and
- Selling food at a charity stall.

8.2 Basic principles

Below we explain what to consider for each key area of basic health and safety. We also outline what is necessary for organisations with both paid staff and volunteers, and how this might be different for an organisation which has no paid staff and is entirely volunteer-run.

Committing to good health and safety practice

Organisations with paid staff and volunteers

We strongly recommend that, as far as possible, an organisation meets the same health and safety requirements for volunteers as are demanded by law for paid employees.

Volunteer-only organisations

If an organisation has no employees, it may not be able to achieve the same standards of health and safety as are required for employees in the short term. However, by aiming to accomplish this, the organisation will demonstrate to its volunteers and the outside world the value it places on them and their efforts to support your organisation.

Health and safety policy

A health and safety policy is the foundation on which to develop procedures and practices. It also announces the organisation's commitment towards good health and safety standards.

Organisations with paid staff and volunteers

Employers with fewer than five employees are not obliged to have a written policy, but are strongly advised to do so. If an organisation involves volunteers, they should always be included in the health and safety policy as a matter of good practice. The Health and Safety Executive for Northern Ireland (HSENI) has [guidance](#) on developing health and safety policies which can be used for creating your own.²²

²² <http://www.hseni.gov.uk/guidance/content-getting-started/content-write-a-safety-policy.htm>

Volunteer-only organisations

If an organisation has no employees it is not obliged to have a written health and safety policy, but is strongly recommended to do so. Developing a health and safety policy helps to clarify procedures and responsibilities.

Health, safety and welfare

Organisations with paid staff and volunteers

All employers must provide a safe place to work which is clean and free from risks, to reduce the risk of ill health or injury. A safe system of working is required: for example, having proper procedures for handling dangerous substances and adequate guards for machinery. All employers should provide adequate supervision. Employees must be given training and information to give them sufficient skills and knowledge to carry out their work safely.

Volunteer-only organisations

These regulations do not apply to organisations with no employees. However, they do need to ensure that their volunteers work in a safe environment where levels of risk have been reduced to a minimum.

Risk assessment

Risk assessment is a technique for identifying and mitigating potential hazards involved with any activity.

Risk is assessed by identifying a hazard and assessing the degree of harm it could cause against the likelihood of it occurring. The assessment then indicates what measures need to be put in place, if any, to reduce the risk to an acceptable level.

For more information, including templates, visit the [Health & Safety and Insurance](#) section of Volunteer Now's Volunteer Management publications.²³

Organisations with paid staff and volunteers

Employers should ensure that their risk assessment always involves employees and volunteers who are involved in the activities which are being risk assessed.

Volunteer-only organisations

Voluntary groups with no employees are not bound to conduct risk assessments, but should consider doing them anyway if they wish to meet their duty of care. Risk assessments are an excellent way to avoid potential problems becoming real ones.

Control of Substances Hazardous to Health (COSHH)

Using chemicals or other hazardous substances at work can put people's health at risk, causing diseases including asthma, dermatitis or cancer.

The [COSHH](#) regulations²⁴ require employers to control substances that can harm workers' health.

²³ <http://volunteernow.co.uk/fs/doc/publications/risk-assessment-and-volunteering-information-sheet-nl.pdf>

²⁴ <http://www.hseni.gov.uk/guidance/topics/coshh.htm>

Organisations with paid staff and volunteers

All employers have a legal duty to assess the workplace for risks to health which may be caused by substances hazardous to health. They must take all necessary steps to control any risks identified. Items such as household bleach may seem harmless, but in the hands of a small child are extremely dangerous.

Volunteer-only organisations

Voluntary groups with no employees are not bound to conduct a COSHH assessment, but should consider doing one anyway if they wish to meet their duty of care. Risk assessments are an excellent way to avoid potential problems becoming real ones.

Fire safety and risk assessment

All public and community buildings, whether owned or operated by an employer or an organisation without employees, must meet minimum levels of standards so that the risk of fire is reduced. The [local fire brigade](#)²⁵ should be consulted for advice.

Registering your organisation's activities

Organisations with paid staff and volunteers

All employers must register their existence with the [HSENI](#)²⁶ or the environmental health department in the [local authority](#).²⁷

Volunteer-only organisations

Organisations without employees do not normally have to register their activities with the enforcement authorities unless they:

- Are involved in dangerous activities, such as putting on a fireworks display;
- Own, control or are responsible for premises and buildings (register with the local fire authority); OR
- Prepare, store, supply or sell food on five or more days in any five-week period (register with the local environmental health department).

An organisation should always check with the authorities if they are in any doubt about the need for registering activities.

First aid

Organisations with paid staff and volunteers

All employers have a legal duty to make a first aid assessment. The need for first aid will depend on the organisation's activities. For instance, an outward bound centre will have very different needs from a morning coffee club.

At a minimum, an organisation with employees must provide at least one first aid box and display a notice that tells staff

- the location of the first aid box;
- who the first aider or appointed person is (see below); and
- where the first aider or appointed person can be found.

²⁵ <http://www.nidirect.gov.uk/index/do-it-online/leisure-home-and-community-online/find-your-local-fire-and-rescue-service.htm>

²⁶ <http://www.hseni.gov.uk/>

²⁷ <http://www.nidirect.gov.uk/index/contacts/local-councils-in-northern-ireland.htm>

An appointed person is someone who has basic first aid knowledge. They can take charge in an emergency and are responsible for calling the emergency services. Details of one-day courses to train appointed persons are available from the [HSENI website](#).²⁸

Volunteer-only organisations

Voluntary groups with no employees are not bound to conduct a first aid assessment, although it is clearly good practice. It can also be useful to have at least one first aid trained volunteer.

In certain circumstances there may be a legal duty to provide first aid facilities. For example, if an organisation holds a public event without first aid facilities and someone is injured, they may have broken their duty of care. An organisation should always check with the authorities if they are in any doubt about the need for registering activities.

Accidents and ill health

Under health and safety law, employers must report and keep a record of certain injuries, incidents and cases of work-related disease.

There is no legal requirement to record every accident, only those that meet the definition of 'serious'. However, keeping records will help you to identify patterns of accidents and injuries, and will help when completing your risk assessment. Your insurance company may also want to see your records if there is a work-related claim.

Information about what needs to be reported and how is available on the [HSENI website](#).²⁹

Organisations with paid staff and volunteers

Employers must report any work-related deaths, injuries, cases of disease, or near misses involving their employees wherever they are working to the [HSENI](#).³⁰

Volunteer-only organisations

Organisations without employees are not bound to report work-related deaths, injuries, cases of disease, or near misses unless they are in control of premises.

9 Insurance

All groups and organisations that involve volunteers should consider what types of insurance they need to put in place to cover them for that involvement. Due to the variation between insurers and policies we can only offer general advice. All groups and organisations should seek specialist advice for more detail.

²⁸ <http://www.hseni.gov.uk/guidance/guidance/topics/first-aid-at-work.htm/>

²⁹ <http://www.hseni.gov.uk/contact-us/report-an-incident.htm>

³⁰ http://www.hseni.gov.uk/riddor_booklet.pdf

When purchasing insurance a volunteer involving group or organisation should:

- Ensure that the policies explicitly mention volunteers and covers them;
- Check if there are upper and lower age limits for volunteers;
- Ensure that the policies and the types of activities that the volunteers will be doing; and
- Conduct a risk assessment for each of the roles that volunteers will be performing, because this will help your insurer to tailor your policy to suit your needs. Putting risk management systems in place can help reduce the chances of claims being made in the first place.

9.1 Employer's liability insurance

Employers must have employer's liability insurance by law. It covers paid employees in the event of accident, disease or injury caused or made worse as a result of work or of the employer's negligence.

This insurance does not automatically cover volunteers. There is no obligation to extend the policy to cover volunteers, but it is good practice to do so. The policy must explicitly mention volunteers if they are to be covered by it.

9.2 Public liability insurance

Also known as third party insurance, it protects the organisation for claims by members of the public for death, illness, loss, injury, or accident caused by the negligence of the organisation. A group or organisation should therefore consider having it in place if its activities could affect members of the public in this way.

Public liability insurance generally covers anybody other than employees who come into contact with the organisation. This should explicitly include volunteers, covering them against loss or injury caused by negligence of the organisation if they are not covered by employer's liability insurance.

It also protects for loss or damage to property caused through the negligence of someone acting with the authority of the organisation, which would include the actions of volunteers. Public liability cover should therefore clearly cover loss or injury caused by volunteers. In some cases a volunteer could be sued as an individual for damage caused to a third party, so the organisation's public liability insurance should indemnify them against this.

9.3 Professional liability insurance

Professional liability, professional indemnity errors and omissions, or malpractice insurance covers the organisation for claims arising from loss or injury caused by services provided negligently or without reasonable care. A group or organisation should therefore consider having it in place if it provides services.

Such loss might arise, for example, from incorrect care or inaccurate advice. An organisation can be sued for claims arising from incorrect advice or information even if it is given free or via a telephone helpline.

An information sheet on [volunteering and insurance](#)³¹ is available from the Volunteer Management section of the Volunteer Now's online publications.

9.4 Insurance for volunteer drivers

It is important that volunteers and organisations are aware of their responsibilities with regard to insurance for volunteers who drive as part of their volunteer role. If the organisation owns the vehicles that volunteers use in the course of their volunteering then it is the organisation's responsibility to arrange insurance cover and see evidence of the driver's credentials. If the volunteer uses his/her own vehicle then they must arrange insurance cover.

If volunteers are required to use their own cars in the course of their volunteering the organisations should inform the volunteer that it is essential for them to let their insurance company know that they will be using their car in the course of volunteering. This should be done in writing and the insurance company should send written clearance to the volunteer. In general this should not involve an increase in premiums.

Organisations could assist their volunteers by providing them with a letter, which they can forward to their insurance company. The letter should:

- Explain that they are a volunteer with your organisation
- State if they are using their car to carry passengers in the course of their volunteering.
- Ask for written confirmation that their insurance policy covers any passenger or third party claim, which might arise out of the use of the vehicle for this purpose.

NB. Some organisations also provide contingent motor liability insurance which protects the organisation if there is a problem with the volunteer's insurance.

An information sheet for [volunteer drivers](#)³² is available from the Volunteer Management section of the Volunteer Now's online publications.

10 Volunteers and copyright

In law there is a presumption that any copyright created by an employee in the course of their employment will be owned by the employer, unless the employee and employer have agreed otherwise.

However, if a volunteer produces an original work in the course of their volunteering then they own the copyright to that work, even if it is created specifically for an organisation. This means that the work cannot be reproduced or changed without their permission.

Therefore, if a volunteer is taking photographs, designing materials or creating art work for your organisation it may be sensible to take steps to ensure that your

³¹ <http://volunteernow.co.uk/fs/doc/publications/volunteering-and-insurance-information-sheet-nl.pdf>

³² <http://volunteernow.co.uk/fs/doc/publications/volunteer-drivers-information-sheet-nl.pdf>

organisation will be able to use these works in the long term without worrying about copyright.

10.1 Are there any exceptions to copyright?

There are a few exceptions where you are able to reproduce copyrighted work without permission but the only ones that are likely to apply are if it is for use by:

- a disabled person who can't access it in its original format
- or in teaching.

However, if you are copying large amounts of material and/or making multiple copies then you may still need permission. It is also generally necessary to include an acknowledgement.

For further information about exceptions visit the [Intellectual Property Office website](#).

10.2 Other rights

Apart from copyright, volunteers will have

- The economic right to make money from their work;
- The moral rights to:
 - Be identified as the author (or director) of the work;
 - Object to derogatory treatment of their work.

Whilst economic rights are generally agreed when copyright is assigned or licensed, moral rights will remain with the creator of the work unless they too are explicitly waived.

10.3 Gaining permission to use works created by volunteers

There are two main ways in which you can gain permission to use works created by volunteers: assignation and licensing.

Assignation

Individuals can assign copyright which means transferring full or partial ownership of the copyright to an individual or an organisation. Volunteers can assign copyright to organisations for which they are producing original work.

We suggest that you ask the volunteer to sign a statement to the effect that

- Control of copyright is being given to the organisation;
- Control of copyright is being given in exchange for a small sum of money;
- Exchange of money relates to control of copyright for material produced, rather than for hours of work done; and
- The work may be used/replicated/reproduced in all possible scenarios.

The following statement can be used for this purpose. However, please bear in mind that it has not been checked by a solicitor when you use or adapt it.

I, (volunteer name), agree to assign copyright on the work I produce to (organisation name) in return for the sum of (e.g. 50 pence).

I understand that this means the organisation has control of copyright for material/work I produce, in a similar way to the control it has over material/work produced by a paid employee.

I understand that this sum is payment for copyright on material(s) I produce or have produced and is not a payment for work.

Licensing

Individuals can license their work, retaining their copyright but allowing an individual or an organisation to use it within the terms of the license.

You may want to seek legal advice in drawing up an appropriate agreement to use with volunteers. Areas the agreement should cover include the:-

- Parties involved;
- Work the license covers;
- Terms of the license, i.e. how the work can be used; and
- Duration of the license.

Alternatively, there are organisations that provide licenses. For example, [Creative Commons](#) licenses provide simple, standardised alternatives to the “all rights reserved” paradigm of traditional copyright.

10.4 Further information

[Intellectual Property Office | About copyright](#)³³

[Intellectual Property Office | Copyright: Essential Reading](#) (PDF)³⁴

[The UK Copyright Service](#)³⁵

11 Employer supported volunteering

Employer supported volunteering (ESV) is the term for any volunteering carried out by employees with the support of their employer, usually during working hours. Not all organisations have the capacity to give staff time off; however organisations can promote volunteering to employees by offering flexi-time / time off in lieu, giving unpaid time off or simply creating awareness of it to staff.

11.1 Benefits

Benefits to employees include developing new interests or skills and supporting local projects.

Benefits to businesses include a motivated and socially engaged workforce, and the good publicity of having helped their community.

³³ <http://www.ipo.gov.uk/types/copy/c-about.htm>

³⁴ <http://www.ipo.gov.uk/c-essential.pdf>

³⁵ <http://www.copyrightservice.co.uk/>

Benefits to the voluntary and community sector organisation include some extra pairs of hands to help out with whatever tasks need doing and the specific skills of the employees.

11.2 Information for volunteers

The employer and the beneficiary organisation should work together prior to the project to ensure that the volunteers have all the information they require for a positive experience. This includes but will not be limited to:

- Dates and times;
- Location;
- Activities;
- Expenses arrangements; and
- Clothing requirements.

11.3 Activities

ESV often works best when you have a specific project in mind, such as creating the scenery for a community play or stewarding at a local festival. A project with a set completion date will provide the volunteers with a sense of achievement. It may also make a better story for the local media.

However, you can approach businesses that will provide you with specific skills. For example, you could ask an interior design agency to help you refurbish your venue or an IT firm to set up a video-diary booth to collect case studies of your participants for YouTube.

In all cases, it is important to make clear what is expected of a volunteer, this may be provided within a written role description, at the very least tasks should be discussed with volunteers prior to an event or as part of an induction. As with all volunteers, it is important to ensure that they are adequately supervised and have the opportunity to provide feedback.

11.4 Expenses

It is good practice to ensure that someone is not out of pocket as a result of their volunteering. Usually, expenses such as travel and lunch costs would be met by the volunteer involving organisation.

However, the situation may not be as straightforward with an ESV scheme. For example, the volunteers may be being paid their usual salary for that day, in which case they would not be out of pocket if they were usually expected to pay for their own travel and food. In some cases, shops and retailers will sponsor ESV by providing sandwiches and drinks for free because it fits with their corporate social responsibility targets and because they want to support volunteering.

In all cases, the employer and volunteer involving organisation should discuss and decide the issue of expenses and other costs before the activity takes place.

11.5 Insurance

When a member of the public makes a claim of liability for death, illness, loss, injury, or accident, it will generally be against the organisation carrying out the activity that led to it. Therefore, employer supported volunteers would be covered by the insurance of the organisation they are volunteering with.

However, this doesn't mean that a claim could not be brought against the employer either by a member of the public or one of their employee volunteers. Therefore, both organisations should seek advice to ensure they are covered. They should also consider whether specific cover is required for the activity, for example if the volunteers are using heavy machinery or driving.

11.6 Publicity

If good publicity is one of the reasons the business has agreed to help you - and it often is - make sure you bear this in mind from the beginning. What kind of stories do your local newspapers and radio stations like to run? Do you have a good relationship with editors and reporters?

Be careful not to promise publicity to a business if you're not sure you can deliver it. It's also better to word agreements in terms of what you will do rather than what you expect other people to do. Agree to 'send a press release to local media followed by a phone call', not to 'secure publicity in the local press'.

11.7 More information

Volunteer Now has produced good practice guides on [Employer Supported Volunteering](#) for Community and Voluntary Groups and Employers.

For further information please contact:



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Company Limited by Guarantee No. NI602399. Registered in Northern Ireland.

The Voluntary Arts Network (operating as Voluntary Arts) is registered in Scotland as Company No. 139147 and Charity No. SC 020345.
Registered office: 54 Manor Place, Edinburgh EH3 7EF.
Voluntary Arts acknowledges funding from Arts Council England, the Arts Council of Northern Ireland, Creative Scotland and the Arts Council of Wales.

