



The recruitment series – 3. Agreeing the role

A guide to leading initial conversations with potential volunteers, using our role description(s) to agree tasks and activities.

Before reading this guide, you might find it useful to watch our online presentation and read our guide on:

1. [Steps to recruiting volunteers](#)
2. [Preparing to meet a potential volunteer](#)



Also see [C1: Volunteering with us](#) for guidance on recruiting, supporting and recognising your volunteer

On the day

Remember to bring:

- copy/copies of the role description
- specific information about the role
- welcome and induction checklist(s)
- your prepared questions and prompts.

If your meeting is over the phone, make sure the potential volunteer has access to the role description and welcome and induction checklist.

People sometimes need a little more information before they'll make a commitment. Taking along extra information like our welcome booklet and a flyer for an upcoming event can help them get a feel for what it'll be like.

Be positive about volunteering

We all like to know what difference our volunteering makes. Share the positive stories about what you and fellow volunteers have achieved to inspire them to join you.

If they don't know us already, get loud about all the changes we've achieved as an MS community in the UK. Volunteering plays a huge role in making our achievements possible.

If a person isn't sure what role might be right for them but wants to help us, use open questions to help explore what they like to do in general and what might interest them. Think creatively about what you might be able to offer them, they might:

- ease themselves in with one or two tasks
- start off with helping out more informally
- buddy up with someone before committing fully.



Our [Welcome Booklet](#) and [volunteer website](#) are useful tools to help someone find out how they could get involved.

Starting the meeting

Potential volunteers may be nervous about meeting you. Before you start, put them at ease:

- check they're comfortable or if they need anything before starting
- ask general questions about their day so far
- set the scene - talk about the volunteering you do, what you like about it and get out of your experience.

Set up the conversation

Tell them what they can expect:

- Explain you'll be asking a few questions but it's also an informal meeting and an opportunity for them to ask questions too
- Tell them that the conversation doesn't commit them to anything and that either of you can change your mind
- Let them know how you're making sure this is a fair process. If you are meeting more than one person for the role, be honest. You may not want to share your success criteria but it may help someone to relax if they know they're compared with others fairly

- Let them know you'll be keeping an eye on the time. You might let them know how long there is left or move the conversation on to the next question to make sure you cover everything
- Tell them what your relationship with them will be if you agree a role together and if it's someone else, who will be supporting them.

Taking notes

It might be useful to take notes during the meeting. Let them know:

- you'll be taking notes and why
- if you're discussing the role with several people, that you can use your notes to review and compare everyone's answers
- how you'll keep their contact details safe and what will happen to the notes you're taking.

Personal information

Remember to follow our [Data protection policy](#). Destroy any notes you've taken when you no longer need them. Keep contact and personal information safely and securely. See [Handling data](#) on the volunteer website.

Be honest

Talk through the commitments listed on all the role descriptions. These are our core principles for all volunteers and staff. They can spark a useful conversation about who we are.



Find out about our commitments in our [Welcome Booklet](#). If you have any questions about them, speak to your key contact

Make sure the person knows how you intend to support them to get started, particularly about mandatory or compliance activities they will need to complete before they take up the role. These details are included in the welcome and induction checklist.



See our guide on [Welcoming and inducting volunteers](#) for more on the activities and tools to help new volunteers settle in

Agreeing the role

After a few initial questions (see 2.1. meeting questions template), the key aim for the meeting is to agree the role and relationship.

Being open and flexible will help recruit and keep volunteers. Potential volunteers don't have to sign up for every task in our role descriptions. Use this conversation to agree what they want to do and not do. You can make notes on a copy of the role description as an informal record between you.

If you need all the tasks of the role to be covered, you may need to recruit another volunteer who is interested in doing the other tasks.

Agreeing tasks

While you can delete tasks as discussed with the volunteer, you can't add any tasks. All our volunteer roles have been designed in line with policy and legislation. Tasks not included would require a risk assessment.

A volunteer can carry out tasks from a number of role descriptions if it fits within their availability and aspirations, and as long as they have completed the necessary induction activities. You should make sure they are making a realistic commitment in taking on tasks from two or more roles at one time.

Ending the meeting

Leave time at the end to sum up. Double check your conversation has told you everything you prepared for and that the volunteer has asked everything they wanted to.

Sum up what you've agreed:

- make sure you've written down key points
- arrange any next steps and agree timings
- if using online recruitment, let them know they'll also receive an email
- plan when you'll speak again

And thank them for taking the time to meet you.

If you're meeting anyone else about the role, tell them when you'll make a decision and be able to let them know.

If they want to have a think before confirming, agree a deadline for them to let you know.

Next steps

Make sure you follow up as agreed.

If you haven't agreed a role by the end of the meeting, let them know your decision as soon as possible. A week should be the longest time, unless agreed otherwise.

Agree with the volunteer when they can start and organise:

- their disclosure check if they need one
- a follow up meeting or call to see how they're settling in
- opportunities to meet people who may help them with their volunteering or events they might find useful
- any necessary training or e-learning.



If you've spoken to more than one person about the role, contact successful people first. If they say no, you might want to offer the role to someone else.

Staying in touch

If you've used our online recruitment so far, please update the person's records when you've decided whether they're successful or not. You can then select to have one of our template emails sent to them. Successful candidates will be sent a link to the welcome page of the volunteer website. People who've been unsuccessful will be sent a link to other volunteering opportunities.

If you've used other methods of recruitment, please post or email the application form to the Volunteering team to let them know you have a new volunteer. The Supporter Care Team will be notified. Make sure they get a welcome and induction checklist.

Personal information

To make sure you keep people’s contact and personal information safe:

- only put one application form per envelope
- Delete the email from your ‘sent’ inbox and ‘trash’

Suggesting other ways to get involved

If someone doesn’t want to do the role, find out why. There might be something you could do differently in future. Or you might be able to suggest another opportunity for them to get involved in.

Our volunteering opportunities

All our [Volunteering opportunities](#) are on the website. You may know of suitable activities that need volunteers so see about putting them in touch. If they’d like to speak to someone, the [Supporter Care Team](#) can also help.



Read the next guides and presentations as part of this series:

4. [Welcoming and inducting volunteers](#)

Was this useful? We’d love to hear from you either way. Please email your comments at volunteering@mssociety.org.uk

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