



**SOUTH DERBYSHIRE
VOLUNTEER FORCE**

Guidelines for Initial Volunteering Conversations

A practical guide for professionals supporting prospective volunteers prior to referral to South Derbyshire CVS Volunteer Force.

Issue: 1.0

Date: June 2026



About this Guide

South Derbyshire Volunteer Force has moved towards a skills and interest-based volunteer matching approach. Rather than filling available vacancies, the aim is to connect volunteers with opportunities that genuinely align with their abilities, motivations and personal goals. Research consistently shows that volunteers who are well matched to their roles are more satisfied, more engaged, and more likely to sustain their commitment over time.

The initial conversation a professional has with a prospective volunteer is one of the most important steps in this process. Done well, it lays the foundations for a positive, sustainable volunteering experience. Done poorly, or skipped entirely, increases the risk of poor matching, early dropout, and missed opportunity.

This guide supports you to have that conversation well. It covers five key areas, each with suggested questions, practical facilitation tips, and guidance on how to handle common challenges. It is designed to be used flexibly, and not as a script, but as a framework you can adapt to the individual in front of you.

Who this guide is for

- Social prescribing link workers and community navigators.
- Health and wellbeing coaches and keyworkers.
- Voluntary sector support workers and employment advisers.
- Any professional introducing or referring someone to volunteering for the first time.
- Volunteer co-ordinators conducting initial enquiry conversations.



Why the Initial Conversation Matters

Volunteers who feel heard and understood from the outset are significantly more likely to find a role that works for them and to sustain it. The initial conversation is not a screening exercise or a form-filling exercise — it is an opportunity to understand the whole person: their hopes, their hesitations, their strengths, and the life context they are bringing with them.

When done well	When done poorly
A person-centred initial conversation... • Creates trust and psychological safety. • Reduces the chance of a poor or unsuitable match. • Identifies barriers early, before they become drop-out. • Enables referral to the right opportunity or additional support. • Helps volunteers see themselves as capable and valued before they start. • Leads to better outcomes for volunteers, organisations and communities.	A poor initial conversation... • Results in volunteers being placed in unsuitable roles. • Misses practical barriers that make attendance impossible. • Leaves people feeling processed rather than listened to. • Leads to early dropout and wasted goodwill. • Can reinforce the belief that volunteering 'isn't for people like me'. • Puts unnecessary pressure on volunteer coordinators downstream.

Before the conversation - setting the scene

The conversation should feel welcoming, unhurried and free from judgement. A few practical things help:

- Choose a private space where the individual feels comfortable, not a busy waiting room or office corridor.
- Allow 30–45 minutes at minimum; some conversations will run longer and that is fine.
- Put the form or referral paperwork to one side, lead with the person, not the process.
- Let the individual know there are no right or wrong answers and no obligation to proceed.
- Frame it as a conversation, not an interview: “I’d like to find out a bit about you and what you’re looking for”.



1 Explore the Individual's Motivation for Volunteering

Understanding why someone wants to volunteer, and why now, is the most important thing you can establish in this conversation. Motivation is the engine of sustained volunteering. When the role matches the underlying motivation, volunteers are far more likely to stay and thrive. When it does not, even initially enthusiastic volunteers drift away.

Motivations are highly individual and rarely just one thing. Someone might want to give something back and tackle loneliness. Another person might be recovering from ill health and looking for purpose, while also hoping to build skills for a future job. Hold all of this without judgement.

Questions to explore	What to listen for
Questions to explore motivation - What has made you think about volunteering currently? - Is there a cause, community or issue that is especially important to you? - What do you hope to get from the experience, for yourself? - Have you volunteered before? What did you enjoy, and what did not work for you? - Is there something you used to do that you'd like to reconnect with? - How would you describe a good volunteering experience, what would it feel like?	What to listen for - Extrinsic vs intrinsic motivation. External pressure (e.g. from a professional or family member) without personal buy-in is a risk factor. - Grief, transition or loss as a backdrop. Volunteering can be healing but should not be the primary therapeutic intervention. - A specific cause or type of organisation they clearly care about, this is a valuable matching signal. - Ambivalence or uncertainty. This is normal and should be explored gently, not resolved quickly. - Previous negative experiences. Name these and acknowledge them before moving on.

Common motivations — and what they may indicate

Motivation	What it may mean for matching
Reduce loneliness or make friends	Prioritise roles with regular team contact, group activity or consistent face-to-face interaction. One-off or remote roles are unlikely to meet this need.
Give something back / contribute	Explore what they want to contribute to specifically. The cause matters, mismatching cause to person is a key failure point.
Improve mental health or wellbeing	Consider pace, predictability and support. A role with clear structure and a regular, familiar environment tends to suit people using volunteering therapeutically.
Build skills or CV	Identify transferable skills they want to develop. Look for roles with learning, responsibility, and the chance to produce tangible outcomes.
Explore a career pathway	Sector alignment is important. Someone interested in health or social care should be matched accordingly, not placed anywhere available.
Regain routine and purpose	Regularity matters more than role type. A weekly commitment, same time, same place, can anchor someone whose life currently lacks structure.



2 Identify Interests, Skills and Strengths

Many people, particularly those who have been out of work, are managing health conditions, or have spent years caring for others, significantly underestimate the skills they bring. This step is often as much about confidence-building as it is about information gathering. Your role is to help someone see themselves as a capable contributor, not to audit their CV.

Lived experience is a skill. Patience learned from caring for a relative, resilience built through managing mental ill-health, empathy developed through personal hardship. These are all things that voluntary organisations genuinely value. Help people name and own them.

Areas to explore	Facilitation tips
Areas to explore • Employment history and professional expertise, including past roles, however long ago. • Education, qualifications and training, formal and informal. • Hobbies, interests and passions. These often point to the most energising roles. • Communication, organisational, leadership or practical skills. • Lived experience that may be valuable. Recovery journeys, caring experience, community knowledge. • Skills they would like to develop or revisit through volunteering.	Facilitation tips • Ask ‘what are you good at, even if you haven’t done it for a while?’ rather than ‘what skills do you have?’. • Use specific prompts: ‘Tell me about a time you helped someone’ or ‘What do people come to you for?’. • Reframe life experience as skill out loud: ‘Being a carer requires huge organisational skill; that’s something most people take for granted’. • Do not rush to fill the silence when someone is thinking, the richest answers often come after a pause. • If someone says ‘I don’t have any skills’, explore this gently, it is almost never true, and believing it is often the biggest barrier they face.

On the Skills Matrix in the Expression of Interest Form

When you come to complete the Expression of Interest, Section 5 asks you to select skills the individual has demonstrable evidence of. Use what has emerged in this conversation to inform those selections but be accurate, only tick skills the person can genuinely evidence, as overstating these leads to poor matching. If the individual has no listed skills to offer at this stage, select that option honestly. The volunteer adviser will work with what is there.

Remember: someone with no listed formal skills may still have significant lived experience and personal qualities that make them an excellent volunteer. Note these in the free-text sections of the form.



3 Discuss Availability and Commitment

Realistic expectations about time and commitment are essential for sustainable volunteering. Over-committing is one of the most common reasons volunteers disengage early, particularly those managing health conditions, caring responsibilities, or a fragile routine. This step is about helping the individual identify what is genuinely workable, not what sounds impressive.

Availability is also not fixed. Someone might only be able to offer two hours a fortnight right now, with the potential to increase this as their confidence or health improves. Build in that flexibility and acknowledge it explicitly.

“Volunteering is entirely flexible and there are opportunities to suit almost any availability. What matters is finding something that is realistic and sustainable for you, not committing to more than feels right.”

Use this as a framing statement early in the availability conversation to reduce any pressure the individual may feel to offer more than they can sustain.

What to discuss	Common barriers
Areas to discuss - Which days and times of the week are they realistically available? - How often would they like to volunteer, for example, weekly, fortnightly, monthly, or on an ad hoc basis? - Are they looking for a short-term commitment (a few months) or something longer-term? - Where are they willing and able to travel to, and how will they get there? - Are they open to remote, hybrid or in-person volunteering, or is one type much better for them? - Are there times of year that are harder, for example, school holidays, seasonal health fluctuations, caring peaks?	Common barriers to be aware of - Transport - lack of a car or access to public transport rules out many locations; do not assume - Caring responsibilities - term-time or school-hours only availability is very common and should be explored - Health conditions that vary day to day - flexible or drop-in roles suit people whose capacity fluctuates - Cost - travel, parking or meals out of pocket; ask if expenses are likely to be a barrier and note this for the referral - Digital access - not everyone can complete remote volunteering; check device and internet access before recommending it - Benefit concerns - some individuals worry volunteering will affect their entitlements; reassure them and encourage them to seek advice if needed



⚠ Important Facilitator Note — Matching Commitment to Role Requirements

One of the most important things you can do in this conversation is compare how long the individual wants to volunteer with the actual commitment that a role they are interested in requires. These two things do not always match, and the consequences of getting this wrong fall almost entirely on the voluntary organisation, not on the individual or the referring professional.

Why this matters: what you may not know!

Advisers who do not regularly work with voluntary organisations may not be aware that many roles carry genuine, structured commitments.

These are not arbitrary; they exist because the role requires it. Examples include:

Type of role	Why the commitment is non-negotiable
Befriending or one-to-one support	The individual being befriended builds trust and depends on consistent contact. A volunteer who disappears after a few weeks can cause real harm to someone who is already vulnerable and isolated.
Youth work, mentoring or tutoring	Young people form attachments. An unreliable or short-term volunteer disrupts progress, undermines trust, and can reinforce a young person's existing experience of being let down by adults.
Specialist or trained roles	Where a volunteer has received substantial training, for example, crisis support, legal advice, health coaching etc, the organisation has invested significant resource. A short engagement makes that investment unrecoverable.
Regular service delivery	Many organisations plan their service around volunteer availability. Gaps create operational failures, this may result in events that do not run, services are cancelled, and paid staff must absorb the shortfall at short notice.
DBS-cleared roles	A DBS check takes time and costs money. Organisations carrying out checks for short-term volunteers who leave quickly bear the cost without the benefit.

⚠ Do not say: “Give it a go, you can quit any time”

This is one of the most common and most damaging pieces of advice a professional can give in this context. It feels reassuring and low-pressure, but it is inaccurate, and for many roles, it is a falsehood.

Volunteering is voluntary in the sense that it is unpaid and freely chosen. It is not voluntary in the sense that commitments made to an organisation carry no weight or consequence. When a volunteer stops attending without notice or withdraws after a short period, the impact on the organisation is real:

- Rotas and delivery schedules collapse, often at short notice, requiring paid staff to cover gaps they were not resourced to fill
- Vulnerable individuals who have built a relationship with the volunteer experience an abrupt and unexplained loss of contact, which can set back their wellbeing or recovery
- Training and induction investment is lost, sometimes representing hours of staff time and direct cost to the organisation
- The organisation's capacity to take on future volunteers from the same referral route is diminished, because trust in the quality of referrals has been eroded
- Small organisations may find a sudden volunteer withdrawal destabilising, especially where they are delivering funded services with output targets attached



What to do instead?

Before discussing any specific opportunity with the individual, find out what commitment that role requires. If you are not sure, ask the volunteer advisor or coordinator directly rather than guessing.

Then have an honest conversation:

- *“This role asks for a minimum commitment of six months, attending every Tuesday morning. Does that feel realistic for you right now?”*
- *“If that feels like too much at the moment, there are other roles with shorter or more flexible commitments, let’s look at those instead.”*
- *“It’s much better to start with something you know you can sustain than to take on something that might become difficult after a few weeks.”*

The right match is one the individual can sustain and the organisation can rely on. An honest conversation about commitment now prevents a damaging experience for everyone later.



4 Understand Expectations

Understanding what someone expects from volunteering and being honest about what is and is not realistic, is essential for avoiding disappointment and drop-out. Expectations that are not explored become assumptions. Assumptions, when not met, become disengagement.

This step also creates an opportunity to gently correct any misconceptions about the volunteering process, the level of structure or support available, or the types of roles that exist.

Questions to explore	Managing expectations
Questions to explore expectations • What would make this volunteering experience feel worthwhile to you? • What types of activities do you enjoy, and which would you prefer to avoid? • Are you looking for something flexible, or do you prefer a clear structure and regular schedule? • Is social interaction a key part of what you're hoping for, or would you prefer something quieter? • Are you hoping volunteering might lead somewhere, for example, a career, a qualification, a particular community? • What does success look like to you in six months' time? • Are there any types of people, environments or situations you would find difficult to work with?	Managing expectations honestly • Be clear that an Expression of Interest is not a guarantee of placement. The volunteer adviser or coordinator will match based on what is available and appropriate. • Avoid overpromising on what a specific role will involve. Role descriptions from the organisation should be shared before a decision is made. • If someone's expectations are unrealistic (e.g. expecting to lead a project immediately), explore this gently and redirect rather than dismiss. • Acknowledge that not every match will be right first time. It is normal to try more than one role before finding the right fit. • If the individual has a very specific expectation that may be hard to meet, note this in the referral so the volunteer adviser is forewarned.

Expectation mismatches to watch for

These are the most common expectation-related reasons volunteers disengage early:

- Expecting instant or significant impact - help them understand that meaningful contribution builds over time.
- Expecting a high level of organisational support or supervision that the role does not offer - explore what level of support they need.
- Expecting clear and frequent feedback from the organisation - some organisations are better at this than others; set realistic expectations.
- Expecting a direct pathway to paid employment - this may happen but should not be presented as likely or guaranteed.
- Expecting every session to feel meaningful or emotionally rewarding - some sessions will be quiet or routine, and that is normal.



5 Share the Benefits of Volunteering

Sharing the evidence base for the benefits of volunteering can be a powerful motivator, particularly for people who are unsure they have enough to offer, or who feel that volunteering is something other people do. It can also help professionals make the case to individuals who have been referred but are hesitant.

Frame this as information, not persuasion. The goal is to ensure the individual has a full picture of what volunteering can offer, not to pressure them into a decision they are not ready for.

Personal	Social	Community
- Improved mood and reduced anxiety. - Sense of achievement and purpose. - Better physical health through activity. - Increased confidence and self-esteem. - Structure and routine to the week. - Development of new and existing skills.	- New friendships and connections. - Reduced loneliness and isolation. - Feeling part of something bigger. - Peer support and shared experience. - Sense of belonging to a community. - Positive social identity outside of illness or caring.	- Direct contribution to causes that matter. - Strengthening local voluntary organisations. - Sharing knowledge and lived experience. - Being a positive role model for others. - Supporting community resilience. - Leaving a legacy through consistent contribution.

Tackling Common Myths about Volunteering

Many people are held back by misconceptions. Address these directly if they arise:

The myth	The reality
<i>"You need lots of free time to volunteer"</i>	Many roles require just a couple of hours a week. Flexibility is built into most modern volunteering offers.
<i>"You need qualifications or experience"</i>	Most volunteer roles require only a willingness to help and a willingness to learn. Skills are developed through volunteering, not required before it.
<i>"I'm too old / too young / too unwell"</i>	Volunteering is genuinely for everyone. Many organisations actively seek volunteers from diverse age groups and lived experience, including people managing health conditions.
<i>"It will affect my benefits"</i>	Volunteering is generally compatible with receiving benefits. Individuals should seek advice from Citizens Advice or their benefits adviser if they have specific concerns.
<i>"I have nothing to offer"</i>	Everyone has something to offer — time, presence, a lived perspective, a skill they have long taken for granted. This is almost always about confidence, not capacity.
<i>"I'll be locked into a commitment I can't manage"</i>	Volunteering is voluntary. Individuals can step back, change roles, or take a break. Good organisations understand this and will not hold anyone to an unsustainable commitment.



Supporting Resources

South Derbyshire Volunteer Force has produced short videos that address the benefits of volunteering alongside busting myths directly and can be shared with prospective volunteers:

Have you ever noticed how good it feels to help someone?

<https://youtu.be/roEJ0mB7cAU>

Myth Busting Part 1

<https://youtube.com/shorts/LxhRZPcfYzk>

Myth Busting Part 2

<https://youtube.com/shorts/yBmH9uzfk0c>

Myth Busting Part 3

<https://youtube.com/shorts/l2kh6gbnzzw>



Using the Personal Development Plan to Capture Conversation Outcomes

The five-step conversation framework in this guide generates a significant amount of valuable information about the individual, their motivations, strengths, availability, expectations and goals. Without a structured way to capture and use that information, much of it can be lost between the initial conversation and the point at which a volunteer adviser makes contact.

The Personal Development Plan (PDP), developed by South Derbyshire CVS Volunteer Force as a companion tool to this guide, provides a structured and person-centred way to record the outcomes of this conversation and support the individual's ongoing volunteering journey. It is designed to be completed with the individual, not on their behalf, and to remain their document throughout.

What is the Personal Development Plan?

The PDP is a guided template that covers six areas, each of which maps directly onto the steps in this conversation guide:

PDP section	What it captures from this conversation
Section 1 — Motivation & Starting Point	Why the individual wants to volunteer, what they are hoping for, practical barriers and support needs, directly reflecting Step 1 of this guide.
Section 2 — Wellbeing Baseline	A self-rated snapshot of current wellbeing across six areas, providing a measurable starting point that can be revisited at review.
Section 3 — Personal Goals	SMART goals across wellbeing, social and personal growth dimensions, developed from the motivation and expectation conversations in Steps 1 and 4 .
Section 4 — Finding The Right Role	The individual's preferred type of volunteering and where they will look, informed by the availability and interest discussions in Steps 2 and 3 .
Section 5 — Skills & Development	Skills the individual hopes to develop and training they may need, building directly on the skills and strengths conversation in Step 2 .
Section 6 — Staying Well	Boundaries, warning signs and wellbeing safeguards to sustain the experience, an area this conversation guide does not cover in detail but which the PDP addresses.
Section 7 — Review & Reflection	A three-point review structure at one, three and six months, enabling the professional and individual to track progress against the baseline and original goals.



How to Use the PDP within this Conversation

The PDP does not need to be completed in a single sitting, and it should not feel like an additional form to fill in. The most effective approach is to weave it naturally into the conversation as you go:

Step 1	As you explore motivation and starting point, invite the individual to note their reasons for volunteering in their own words in Section 1 of the PDP. Ask if they would like to rate themselves on the wellbeing baseline in Section 2. Frame it as a useful starting point to look back on, not an assessment.
Steps 2–3	The skills, interests and availability discussion maps naturally onto Sections 4 and 5 of the PDP. You do not need to complete these formally in the session, but making notes as you talk means less reconstruction afterwards.
Step 4	The expectations conversation is where the three SMART goal tables in Section 3 of the PDP come into their own. Work through one goal together in the session; the individual can complete the others at home if they prefer.
Step 5	Share the benefits conversation is a good moment to introduce Section 6 of the PDP (staying well). Ask the individual to think between now and your next contact about what their early warning signs might look like.
After the session	Complete any remaining sections together at a follow-up conversation or send the individual home with the PDP to add to at their own pace. Book the first review point before you close the session.

The PDP is available from South Derbyshire CVS Volunteer Force. A companion facilitator guide, which provides detailed guidance on supporting an individual through each section of the PDP, is also available on request.



Benefits of Using the PDP as a Professional

The PDP is primarily a tool for the individual, but it offers significant benefits to the professional supporting them. These benefits operate across three areas: quality of the referral, quality of the ongoing support relationship, and quality of the evidence you hold.

Better referrals	Stronger relationships	Clearer evidence
The PDP ensures you arrive at the Expression of Interest with a clear, structured picture of the individual. Rather than trying to recall what was discussed, you have a completed record of their goals, skills, availability and any barriers, which directly informs how you complete the referral form. The volunteer adviser receives a much richer picture of the individual from the outset, reducing the time needed to establish basics and allowing the matching conversation to start at a more meaningful level. Relevant sections of the PDP can be shared with the volunteer adviser (with consent), making the referral significantly more useful than a name and a phone number.	Working through the PDP with the individual creates a shared reference point for your ongoing support conversations. At each review you can return to the same document, track progress against the original goals, and update it together, making the support feel continuous rather than episodic. The PDP gives the individual something tangible to hold onto between appointments, a document that is theirs, that reflects their own words and goals, and that marks them as someone with agency in their own journey. Where the volunteering experience leads to a change in someone's circumstances, improved wellbeing, new skills, reduced isolation etc. The PDP provides a structured record of that change from a documented baseline.	The PDP's wellbeing baseline and review structure provide measurable, self-reported evidence of change over time. This can support your own reporting, case recording and outcome measurement requirements. For services that need to demonstrate social prescribing or community engagement outcomes, the PDP provides a consistent format for capturing what changed and when, across a caseload, not just for one individual. Where someone's engagement does not progress as hoped, the PDP record shows what was explored, what barriers existed and what alternatives were considered, protecting the professional as well as the individual.



Referring to South Derbyshire Volunteer Force

Before commencing with a referral, you **must** ensure the individual is aware of the following:

- Participation is entirely their choice.
- They can decide whether to pursue volunteering opportunities.
- They can withdraw from the process at any time.
- An Expression of Interest is not a commitment to a specific role. It is the beginning of a supported journey to find the right volunteering opportunity, one that works for the individual and for the organisation they join.
- Information submitted on an Expression of Interest will only be shared on a need-to-know basis and will be stored securely and in line with data protection requirements.
- Voluntary roles may have requirements such as references, interviews, training, Disclosure and Barring Service (DBS) Checks, induction and or role specific training.
- To seek advice if they have concerns about how volunteering may affect their benefit entitlements, although volunteering itself is generally compatible with receiving benefits.
- As the referring professional you will be copied into correspondence and will be provided updates on engagement and progress.

Example framing statement:

"Before we go any further, I want to make sure you have all the information you need to decide how you'd like to proceed, and I want to be clear that there's absolutely no pressure either way."

"Volunteering is entirely your choice. You decide whether you want to explore opportunities, and you can step back from the process at any time, no explanation needed."

"If you do decide to submit an Expression of Interest, that isn't a commitment to anything. It's simply the start of a supported conversation to find the right opportunity for you, something that genuinely fits your life, your interests and your goals."

"Any information you share will only be used on a need-to-know basis and will be stored securely in line with data protection law."

"It's worth knowing that some volunteering roles do have requirements, things like references, an interview, specific training, an induction, or a DBS check. If any of that applies to a role you're interested in, it will be explained to you clearly before you make any decisions."

"If you receive any benefits and you're unsure how volunteering might affect them, I'd encourage you to get some advice, though in most cases volunteering is perfectly compatible with receiving benefits."

"One last thing, as the professional supporting you, I would normally be copied into correspondence from Volunteer Force and kept updated on how things are going. If you're not comfortable with that, that's completely fine and it won't affect the support you receive. You have the option to complete the Expression of Interest yourself, directly and independently, which means your information stays between you and Volunteer Force."

"Do you have any questions about any of that before we continue?"



Consent To Share Progress Information with a Referring Professional

When a professional refers an individual to South Derbyshire Volunteer Force, the default process is to copy the referring professional into correspondence and share updates on engagement and progress. This is intended to support **continuity of care** and **joined-up working**.

However, individuals have the right to refuse this. If someone is not comfortable with their referring professional receiving information about their volunteering engagement or progress, that is a completely valid choice and must be respected without question. **Consent should never be assumed, and it should never be a condition of accessing volunteering support.**

Where an individual **does not wish** their professional to receive updates, they should be signposted to complete the Expression of Interest themselves, directly and independently, at:

[Volunteer Expression of Interest Form \(V3\)](#)

Completing the form independently means the individual **retains full control over who knows about their volunteering journey**. The volunteer adviser or coordinator will work with them directly, and no information will be shared with the referring professional without the individual's explicit consent.

Professionals must make this option clear at the outset, so that the individual can make a genuinely free and informed choice about how they wish to proceed.

Once you have established that volunteering is something they want to pursue, and their **consent**, here is a summary of your next steps.

1.	Summarise what you have learned in the conversation, for example, motivations, skills, availability, expectations , and check this back with the individual before proceeding.
2.	Support the individual to complete the South Derbyshire Volunteer Force Expression of Interest form (Volunteer Expression of Interest Form (V3)). Remember to select 'Professional Referral' for question 6 and complete your details as the referring professional.
3.	Let the individual know that a volunteer adviser will make contact within 5–10 working days . Ask them to check their spam or junk folder if they have only provided an email address.
4.	As the referrer, you will be copied into all email correspondence between Volunteer Force and the individual. Contact volunteer@sdcvs.org.uk or call 01283 219761 if you need an update on progress.
5.	Keep a record of the conversation in line with your organisation's record-keeping and data protection policy.