SOUTH DERBYSHIRE
VOLUNTEER FORCE

Facilitator Guidelines

Supporting an Individual Through the Volunteering Personal Development Plan

A guide for keyworkers, support workers, health and wellbeing coaches, and voluntary sector practitioners.

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Introduction

This guide supports professionals who are helping an individual complete the Volunteering Personal Development Plan (PDP). The PDP is designed to be person-centred, strengths-based and flexible, and it is not a form to be filled in for someone, but a structured conversation tool to be worked through with them, at their pace.

These guidelines cover the purpose of each section, suggested questions and facilitation approaches, things to watch for, and guidance on boundaries and referral.

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.

Core Principles for Facilitation

Do	Avoid
• Follow the individual's lead on pace and depth. • Use open questions and active listening. • Affirm and build on existing strengths. • Acknowledge that completing this may feel unfamiliar or emotional. • Allow silence, it often means someone is thinking. • Record only what the individual is comfortable sharing. • Revisit sections across more than one conversation if needed.	• Filling in the form on behalf of the person. • Assuming what someone wants from volunteering. • Rushing through sections to complete the document. • Projecting your own values about what is a 'worthwhile' role. • Treating the PDP as an assessment or a gatekeeping tool. • Pushing someone to set goals they are not ready for. • Sharing the completed form without explicit consent.

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Before You Start - Preparing for the conversation

A good, facilitated PDP conversation rarely happens cold. Take a few minutes to prepare:

Practical preparation

- Have a printed or digital copy of the PDP ready, but do not place it between you like a form.
- Choose a quiet, private space where the individual feels comfortable.
- Allow at least 45–60 minutes for an initial conversation; some people may need two sessions.
- Let the individual know in advance what the form covers so they can think about it.
- Have information about local volunteering opportunities to hand, but do not push these.

Setting the tone

Start by explaining what the PDP is for and, importantly, what it is not. A useful opening might be:

> *"This is a personal document that belongs to you. There are no right or wrong answers and nothing you say will affect any support you receive. We're going to go through it together, and you can stop, skip sections, or take it home to complete in your own time."*

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Section-by-Section Facilitation Guidance

Section 1 - Motivation & Starting Point

Purpose	To help the individual explore why volunteering appeals to them and to surface any practical or emotional factors that might shape the experience. This section sets the foundation for everything that follows.
Key questions to explore	• What is it that has made you think about volunteering now? • What does a good week look like for you now? • Is there anything you feel you used to do that you'd like to get back to? • Are there things that might make it harder to get started, even small ones? • What would make this feel safe enough to try?
Facilitation tips	• Some people will talk fluently; others may not have thought about this before and may need prompting gently. • Do not steer them towards causes or roles, let motivation emerge from them. • If they mention a past volunteering experience (positive or negative), explore it gently before moving on. • The 'barriers' question is important, barriers named here may need to be addressed before anything else.
Watch for	• Disengagement or flat affect when asked about motivation, this may indicate depression or low hope; do not push, validate and move gently. • Mentions of caring responsibilities, health conditions, or financial pressures that may need separate support. • Very high expectations or pressure from someone else (e.g. a family member or professional) to volunteer.

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Section 2 - Wellbeing Baseline

Purpose	To establish a starting point that can be revisited at review. This is not a clinical assessment; it is a self-rated snapshot. Its value is in tracking change over time, not in the numbers themselves.
Key questions to explore	• How would you describe how you've been feeling recently, across these different areas? • Is there one area that feels particularly low right now? • Which of these would you most like to see improve? • What does a '4' or '5' look like for you in that area?
Facilitation tips	• Frame this as a reflection tool, not a test, reinforcing 'there's no right score'. • Avoid interpreting their scores for them; ask what the numbers mean to them. • If all scores are very low (1–2 across the board), this may not be the right moment to progress to goal setting, pause and check in. • Keep a copy of the baseline scores yourself so you can refer to them at review.
Watch for	• Very low scores across all areas, particularly around mood and energy, which may suggest the person is not yet ready for volunteering and needs other support first. • A large gap between how someone scores themselves and how they present in conversation. • Distress when discussing any area, acknowledge and offer to return to it later.

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Section 3 - My Volunteering Goals

Purpose

To help the individual articulate what they want from the experience in personal, concrete terms. The SMART framework is a guide, not a requirement. Do adapt it to the person's communication style and confidence.

Key questions to explore

- If volunteering goes well, what do you hope will be different for you in six months?
- What would tell you that this was worth it?
- Is there a particular feeling you're chasing, for example, belonging, usefulness, pride, calm?
- What's one small, specific thing you'd like to achieve in your first month?

Facilitation tips

- It is fine to have a conversation about goals first and return to write them up later once they are clearer.
- Goals do not need to be impressive, 'I want to feel less lonely' is a completely valid goal.
- Help people make goals specific without making them feel judged. Use phrases like 'what would that look like?' rather than 'is that measurable?'.
- Some people may not have any experience of goal setting; go slowly and use examples if helpful.

Watch for

- Goals focused entirely on what the person can do for others, with nothing about their own wellbeing, gently encourage self-focused goals too.
- Goals that feel like someone else's ambitions for them.
- Someone setting many large goals very quickly, which can lead to feeling overwhelmed. Encourage them to choose one or two to start with.

What is a SMART goal?

SMART is a framework that helps turn a vague wish into a clear, achievable intention. Each letter stands for a quality that makes a goal easier to pursue and measure. In this context, use it as a gentle guide rather than a rigid checklist. The aim is clarity and confidence, not perfection.

Letter	Stands for	What to ask the individual
S	**Specific**	What exactly do you want to achieve? The more clearly you can picture it, the better. "I want to feel less anxious" becomes "I want to feel confident enough to walk into a room full of new people."
M	**Measurable**	How will you know you've got there? This does not need to be a number, it could be a feeling, a behaviour, or feedback from others. "I'll know because I'll be able to stay for the whole session without leaving early."
A	**Achievable**	Is this realistic, given where you are starting from? Not easy, but genuinely within reach if you commit to it. It's fine to aim high, but goals that feel impossible can quickly become disheartening.
R	**Relevant**	Does this goal connect to what matters to you? A goal someone else has set for you is much harder to stay motivated about. Make sure it reflects the individual's own values and wishes.
T	**Time-bound**	When do you want to reach this by? A deadline creates a gentle sense of direction. It does not have to be rigid, for example, "By the end of my third volunteering session" is just as valid as a calendar date.

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Section 4 - Finding the Right Volunteer Role

Purpose	To support the individual to think practically about what kind of role would suit them. This section should feel exploratory and exciting, not like a job application.
Key questions to explore	• Is there a cause or community you already feel connected to? • Do you prefer being around lots of people, or would a quieter, more behind-the-scenes role feel easier to start with? • How much time do you feel you could realistically offer, without it feeling like a pressure? • Would you like to try a taster first before committing? • Are there things you would not want to do, and that's fine?
Facilitation tips	• This is a great moment to share local knowledge. If you know of a relevant opportunity, mention it as one option among several, not a recommendation. • For people with anxiety or low confidence, the idea of contacting an organisation directly can feel daunting, offer to help with this if appropriate to your role. • Explore whether in-person or remote volunteering might suit them better, as both are valid. • A taster session or one-off event can be a lower-stakes way to start.
Watch for	• Someone choosing a role that seems designed to please others rather than genuinely interest them. • Roles involving vulnerable groups where the individual's own circumstances may make this difficult. Explore carefully and refer to the volunteer coordinator if needed. • Overcommitting, if someone says they want to volunteer five days a week, explore this gently.

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Section 5 - Skills & Development

Purpose	To help the individual recognise existing strengths and identify what they might gain. This section is often confidence-building, particularly for people who feel they have 'nothing to offer'.
Key questions to explore	• What do you feel you are already good at, even if you haven't used it for a while? • Is there something you've always wanted to try or learn? • What kind of support would help you feel ready to start? • Have you heard about what training the organisation provides?
Facilitation tips	• People who have been out of work or out of community life for a long time often significantly underestimate their skills. Use reflective questioning to draw these out. • Reframe life experience as skill: caring for a family member builds patience and empathy; managing a health condition builds resilience and self-awareness. • If a DBS check or safeguarding training is likely to be needed, mention it here so it does not come as a surprise later.
Watch for	• A complete inability to name any skills or strengths, may reflect very low self-esteem and is worth noting in your own records. • Anxiety about formal training requirements (e.g. DBS, moving and handling) that might put someone off. Normalise and explain the value, benefits and process.

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UK DBS Checks - Guidance for Facilitators

A Disclosure and Barring Service (DBS) check is a background check carried out by the UK government that allows organisations to see whether a person has a criminal record. For many volunteering roles, particularly those involving contact with children, young people, or vulnerable adults, a DBS check is a legal or policy requirement before the volunteer can begin. Raising this early, and explaining it clearly, removes anxiety and avoids it feeling like a barrier.

Level of check	What it shows	Typical volunteering context
Basic DBS Check	Unspent convictions and conditional cautions only. This is the lowest level of check and does not show spent convictions (those that have elapsed under the Rehabilitation of Offenders Act 1974).	General volunteering roles with limited or incidental contact with the public, such as admin support, fundraising, or events assistance. May be used when an organisation wants reassurance without a full statutory check being required.
Standard DBS Check	Both spent and unspent convictions, cautions, reprimands, and final warnings held on the Police National Computer. Provides a fuller picture than a Basic check.	Roles involving regular contact with adults in a professional or quasi-professional context, such as a volunteer receptionist at a medical practice or an advice centre, where trust and integrity are important but regulated activity is not involved.
Enhanced DBS Check	Everything in a Standard check, plus any additional information held by local police that is considered relevant and proportionate to disclose. This is the most thorough level of check.	Roles involving regular, unsupervised contact with children, young people, or adults in regulated activity, such as befriending, mentoring, youth work, or supporting adults with care needs. The most required check in the voluntary sector.
Enhanced DBS with Barred List check	Everything in an Enhanced check, plus a check against the Children's Barred List and/or Adults' Barred List, and registers of individuals who are legally prohibited from working with those groups.	Required for roles that constitute 'regulated activity' under the Safeguarding Vulnerable Groups Act 2006, such as teaching, personal care, or unsupervised one-to-one work with children or vulnerable adults. Legally required in many settings.

Why DBS checks matter when working with vulnerable groups

Children, young people, and adults in vulnerable circumstances are at greater risk of harm, exploitation, or abuse. DBS checks are one layer of a wider safeguarding framework that organisations use to reduce this risk. They are not a guarantee of safe behaviour, but they help ensure that people who have previously caused harm to others are not placed in positions where they could do so again.

Key points to share with the individual:

- A DBS check is carried out by the organisation, not the individual. The volunteer does not need to arrange it themselves.
- For most voluntary roles, there is no fee to the volunteer. The organisation covers the cost or uses a registered umbrella body.
- Having a criminal record does not automatically prevent someone from volunteering. Organisations consider the nature of the offence, how long ago it occurred, and the requirements of the specific role.
- The DBS Update Service allows individuals to keep a certificate current and share it with multiple organisations, avoiding repeated applications.
- If the individual has concerns about what might appear on a DBS check, acknowledge this sensitively and signpost them to Nacro or their organisation's HR or safeguarding lead for confidential advice.
- DBS checks are one part of safer recruitment. Good organisations will also take references, provide induction, offer supervision, and pair new volunteers with an experienced colleague.

Facilitators note: You should always check what level of DBS check the receiving organisation requires before the individual begins the application process. If you are unsure, contact the volunteer co-ordinator directly. Never advise an individual that they do not need a check without verifying this with the organisation.

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Section 6 - Staying Well

Purpose	To support the individual to think proactively about boundaries and self-care. For many people, particularly those with existing health conditions or caring responsibilities, this section is crucial in preventing a positive experience from becoming overwhelming.
Key questions to explore	• What would be your early warning signs that you're taking on too much? • What would you do if volunteering started to feel like too much? who would you tell? • It's completely fine to step back from volunteering. How would you feel about doing that if you needed to? • What do you already do that helps you recharge?
Facilitation tips	• Normalise the idea of boundaries from the start. This is about sustainability, not pessimism. • For people who have a history of burnout, exhaustion, or difficulty saying no, spend extra time here. • Encourage them to name a specific person they could speak to if things felt difficult. Ideally the volunteer co-ordinator as well as someone in their personal life. • If someone has a mental health condition, acknowledge that volunteering can sometimes trigger a dip. Plan for this, do not avoid it.
Watch for	• Someone who dismisses this section ('I'll be fine') but shows signs of people-pleasing, difficulty asserting needs, or a history of over-commitment. • No support network identified. This may be a sign of significant social isolation that needs addressing separately. • Mentions of past experiences where helping others led to personal harm, relapse, or crisis.

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Section 7 - Review & Reflection

Purpose	To set up a structure for ongoing support and reflection. Completing this section at the outset ensures the individual knows that review is part of the process, not an afterthought.
Key questions to explore	• When would feel like a good time to check in together on how things are going? • Who else might it be helpful to share your progress with? • What would you want to celebrate, even if things have been difficult?
Facilitation tips	• Book the first review point before the session ends, even informally. • Remind the individual that goals can and should change, and that the plan is a living document. • If your involvement has a time limit (e.g. a fixed-term service), be clear about when your support will end and who they can go to afterwards.
Watch for	• No follow-up support in place after your involvement ends. Ensure a warm handover rather than a cliff edge. • A significant drop in wellbeing scores at review. Explore what has happened and consider whether a pause in volunteering is appropriate.

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Safeguarding, Boundaries & Referral

The PDP conversation can sometimes open disclosures or reveal unmet needs. Below is a brief guide to navigating this within your role.

If someone discloses a safeguarding concern

- Follow your organisation's safeguarding policy immediately.
- Do not promise confidentiality before a disclosure is made.
- Record the disclosure in the individual's own words where possible.
- Do not investigate, interrogate or attempt to resolve the concern yourself.
- Inform your designated safeguarding lead (DSL) as soon as possible.

If someone is not ready for volunteering yet

The PDP may reveal that someone needs other support before they are ready to engage with volunteering. This is a positive outcome; it means the conversation has done its job. Consider:

- Referral to a GP, mental health service, or talking therapies if mental health concerns are raised.
- Referral to social prescribing for a broader needs assessment.
- Practical support with barriers such as debt, housing, or caring pressures.
- Simply keeping the door open and revisiting volunteering later.

Staying within your role

This PDP is a facilitation tool, not a clinical assessment, a care plan, or a contract. Your role is to support, not to direct. If you are uncertain about whether something is within your remit:

- Consult your supervisor or line manager.
- Refer to the individual's existing key worker or support professional if one is in place.
- Document what you observed, and any actions taken.

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After the conversation

1.	Give the individual their copy of the completed PDP and confirm they are happy with what has been recorded.
2.	Keep your own record of the session in line with your organisation's data protection and record-keeping policy.
3.	Note any referrals, follow-up actions, or concerns that arose and action these promptly.
4.	If contacting a volunteering organisation on the individual's behalf, ensure you have their explicit consent first.
5.	Diarise the first review point and send a reminder to the individual in advance.
6.	Reflect briefly on how the conversation went — what worked well, what was difficult, what you might do differently.

Useful Phrases for Difficult Moments

Situation	You might say…
Someone says they have nothing to offer.	*"It sounds like you've had a lot of experience supporting people, that is something a lot of organisations really value."*
Someone becomes tearful or distressed.	*"Take your time. We don't need to carry on today. What would be most helpful for you right now?"*
Someone is unsure if volunteering is right for them.	*"There's no pressure to decide anything today. Even thinking this through is a useful step."*
Someone's goals feel unrealistic.	*"That sounds like something you really care about. What might be a first step towards that?"*
Someone skips a section or refuses to answer.	*"That's completely fine. We can come back to it or leave it blank; this is your document."*
Someone raises something beyond your remit.	*"Thank you for trusting me with that. I want to make sure you get the right support. Would it be okay if I spoke to [colleague / service] about this?"*

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