

# Volunteer Policy

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## 1. Policy Statement

- 1.1 Help & Care, led by the Board of Trustees and Chief Executive recognises the contribution that volunteers make to support the work of the organisation. It takes its duty of care to its volunteers seriously and will support them to carry out their tasks safely and within the law allowing them to gain positive experiences from their time with the organisation.
- 1.2 We expect all employees directly working with volunteers to play a role in understanding and acting within the spirit of the policy, working productively, and acting as role models for volunteers and other colleagues.
- 1.3 We take our duty of care to our service users very seriously, the support that our employees give to volunteers is imperative in supporting them to understand the parameters of their role and what to do if they have concerns.
- 1.4 All employees working with volunteers will be supported through centrally organised training, their line management, access to relevant information and through peer support amongst their colleagues in similar roles.
- 1.5 The policy will be reviewed at least every two years, or sooner if legislation changes, *by the relevant Director* in consultation with those involved in volunteering services, to ensure that it remains appropriate to legal requirements and the needs of Help & Care and its volunteers.

## 2. Introduction

- 2.1 Help & Care is committed to working in partnership with volunteers and volunteer involvement is welcomed and encouraged. Volunteers have an established and integral role in Help & Care and make a vital contribution to its success.
- 2.2 Help & Care recognises that the benefits of volunteering are twofold, and people volunteer for many reasons. This includes the opportunity to contribute to the work of Help & Care, for personal development, as a step towards paid employment and for social reasons.
- 2.3 The activities of volunteers should always have a positive outcome and will complement the core values and objectives of the organisation. Outcomes could be measured in different ways including for the individual service user, for the volunteer or to influence change in policies and practices internally or elsewhere.

## 3. Purpose and Scope

This policy has been compiled to set out the broad principles for volunteer involvement in Help & Care, across all its teams. It outlines how employees should support volunteers and what volunteers can expect from Help & Care in their volunteering role.

This policy applies to all employees, volunteers, clients, trustees, funders, and external partners.

## **4. Roles and responsibilities**

4.1 Help & Care will deploy employees to guide, support and advise volunteers in their tasks. These employees, in turn, will be supported through their line management and their peers to ensure that volunteers receive the best possible experience, and that Help & Care meets any legal obligations in relation to them. Roles and responsibilities relating to volunteering are outlined in **Appendix A**

### **4.2 Help & Care recognises the right of volunteers to:**

- know what is expected of them
- have clearly specified lines of support and supervision
- be insured
- have safe working conditions
- be paid expenses
- be trained to carry out their tasks safely and learn new skills
- be shown appreciation
- know what their rights and responsibilities are if something goes wrong
- be free from discrimination

### **4.3 Help & Care requires volunteers to:**

- be reliable
- respect confidentiality
- make the most of training and support opportunities
- carry out tasks in a way which reflects the aims and values of the organisation
- adhere to applicable policies & procedures
- have 'Business Use insurance' for their vehicle if using it for volunteering role
- undertake a satisfactory DBS check if the volunteering role requires it

The views of employees, volunteers, funders, and service users will be sought to identify opportunities to develop volunteering and improve the way in which we work.

## **5. Main content**

### **5.1 Definition:**

A volunteer is someone who, without financial compensation beyond the reimbursement of expenses, offers their time, knowledge, and experience to perform a task at the request of, and on behalf of, Help & Care.

The importance of maintaining a balanced, effective, and mutually beneficial employee-volunteer relationship is essential. It is based on the principle that employees provide structure, organisation, direction, and day-to-day management. Volunteers add value to the organisation's work by performing

a range of supportive roles, contributing time, flexibility, and specialist skills. Within this framework, volunteers are supported and encouraged by Help & Care but will not be used as a substitute for paid employees. The volunteer role is a gift relationship, bound only in honour, trust, and mutual understanding.

- People can volunteer in different places across the organisation
- Help & Care will monitor the impact of its volunteers and volunteering activity, acting on its findings
- All volunteers should be aware of the work and values of Help & Care, how they contribute to it and how Help & Care can support them
- Help & Care will strive for 'best practice' in its recruitment, training and support to volunteers and will create opportunities for volunteers to learn and develop to deliver their role effectively
- Help & Care will create role profiles for all opportunities. This will help match volunteers with opportunities and the 'tasks' required and be relevant to services in question
- Help & Care will have clear processes and systems for identifying and advertising potential volunteering opportunities to attract people from all walks of life and be best matched with what is needed.
- Help & Care aspires to always have a selection of opportunities that each volunteer may be matched to at any one time.
- Volunteers will be empowered to lead volunteering activity and Help & Care will ensure that this is done within appropriate governance arrangements.
- Volunteers should be enabled to enjoy what they do. Help & Care will create a volunteering environment that is both 'rewarding' and 'meaningful'.
- Help & Care will recognise the contribution that volunteers make to the organisation at both individual and collective levels. This may be through the team with whom they work as well at organisational level.

Although volunteers offer time freely and willingly and without binding obligation, there is a presumption of mutual support and reliability. Reciprocal expectations are acknowledged, as set out in the volunteer agreement (**Appendix B**)

## 5.2 **Induction and Training**

All volunteers will undertake an induction and training programme to make them feel welcome and to provide them with the necessary information and skills to carry out assigned tasks. Employees working with volunteers will be trained in managing and engaging with volunteers effectively.

## 5.3 **Support and Recognition**

All volunteers will be supported by a named contact within Help & Care. It is important that all volunteers feel valued and that their efforts are recognised. Support will be through one-to-one and/or group meetings and will be negotiated with the volunteer.

## 5.4 **Dealing with Problems and Complaints**

Most problems can be addressed or averted by good, open communication, support, and supervision. Further action will only be taken if issues are not resolved to the mutual satisfaction of the organisation and the volunteer. Problems and complaints will be dealt with in accordance with the Problem-Solving Procedure (**Appendix C**)

#### 5.5 **Insurance and Data Protection**

Help & Care's Public Liability Insurance includes the activities of volunteers and liability towards them wherever the activity takes place and so long as the volunteer is resident in the UK. This policy has been amended by the insurance provider for home working in response to the COVID-19 pandemic. The organisation does not insure personal possessions of volunteers against loss or damage. All volunteers will be required to seek advice about vehicle insurance when their volunteering role requires them to get to and from their volunteering and /or to carry people in their vehicle.

Personal information recorded about volunteers will be stored and maintained with appropriate safeguards for confidentiality and in compliance with the Data Protection Act and UK GDPR. Volunteers will receive information on this, and their consents will be sought for this. Volunteers will also be informed of their rights to have access to personal records.

Volunteers will be reimbursed for all agreed expenses in line with the Volunteer Expenses Policy (**Appendix D**).

#### 5.6 **Volunteer Involvement in Decision Making**

All volunteers will be offered the opportunity to contribute to Help & Care's practice relating to volunteering. This may be on an ad hoc basis through formal and informal feedback and could be on a one-to-one basis or at group meetings. Feedback could be about specific volunteering roles/services or the general deployment of volunteers across the organisation.

#### 5.7 **Leavers**

Volunteers may cease their involvement with Help & Care at any time and may do so for a variety of reasons. An Exit Interview will be carried out as set out in the Volunteering Procedures and outlined in **Appendix E**

### 6. **Training**

All employees who have lead responsibility for supporting volunteers in their role will be made aware of this policy. They will be supplied with the relevant resources and support to enable them to operate effectively and within the spirit of the policy. A competency framework is available to employees to help them assess their development needs in this area.

The training will be provided as they join the organisation/their role and through ongoing peer network and training events organised throughout the year.

This training will include the processes that are in place to support volunteers to make them feel welcome and to provide them with a positive volunteering experience.

## 7. Implementation, monitoring & review

The policy has been developed using national best practice, alongside employees who are involved with volunteers across the organisation and a peer network helping inform changes that may be required.

The policy is made available to volunteers and potential volunteers in the form of a summarised version as public information.

A formal review takes place every two years and sooner if legislation changes.

## 8. Volunteer Policy Appendices

<b>Appendix A</b>	Roles and responsibilities
<b>Appendix B</b>	Volunteer agreement
<b>Appendix C</b>	Problem solving procedure
<b>Appendix D</b>	Volunteer Travel Expenses
<b>Appendix E</b>	Exit Interview

## **Appendix A Roles and responsibilities (Volunteer Policy)**

### **Board/CEO/Leadership team**

- Set vision for volunteering, agree strategy, and allocate resources accordingly

### **All staff and board members**

- Uphold Help & Care/Healthwatch policies and practice when dealing with volunteers and acting as a role model

### **Directors and Managers**

- Ensure services are clear on policy and act in accordance
- Agree monitoring and review processes
- Deal with complaints at relevant level
- Ensure systems are compliant with Data Protection legislation, and that relevant checks and consents are collected and recorded
- Ensure relevant staff understand their responsibility for volunteers and support learning in relation to relevant competency framework
- Ensure appropriate volunteering recruitment activities for service, developing volunteer role profiles in line with emerging needs
- Ensure delivery of core training and service specific training to volunteers
- Ensure adequate and relevant service reporting on volunteering
- Participate in development of volunteering at organisational level
- Keep up to date with organisational changes relating to volunteers

### **HR**

- Advise on good practice in volunteer management and processes including use of references, DBS checks for volunteer roles, etc.
- Hold volunteers' personal information on HR database

### **Marketing and Communications leads**

- Support communications on volunteering internally and externally

### **Finance**

- Budget forecast and setting
- Processing expenses in timely manner

### **Subject and Volunteering Service Leads**

- Ensuring volunteer policy is in line with good practice and quality assurance activities are undertaken (e.g., Volunteer Survey and liV accreditation)
- Collaborating on implementation of processes and training, ensuring colleagues have relevant recruitment and induction information for volunteers
- Liaising on communications relating to volunteering activities e.g., collating stories from volunteers and organising celebration activities
- Keep abreast of volunteering issues and participate in learning activities relating to good practice in volunteering
- Ensuring information on volunteers is up to date, compliant and available plus monitoring records on the deployment of volunteers is logged appropriately
- Undertake service review with volunteers as appropriate.



## APPENDIX B Volunteer Agreement

This Volunteer Agreement sets out Help & Care's commitment to you and what we expect of you in your volunteering role.

**Help & Care** strives to make your volunteering experience as safe, enjoyable, and as fulfilling as possible and will:

- Provide training to allow you to undertake your role adequately including: -
  - An introduction to Help & Care, your local team and what it does
  - What our responsibilities are and how this affects you
  - Specific training for the role that you are undertaking
- Take responsibility to ensure a safe working environment
- Have adequate insurance to cover you in your work under our Public Liability and Professional Indemnity insurances
- Provide adequate protective clothing and equipment as appropriate
- Look after your personal information in accordance with legislation placed upon us
- Ensure that you have a named person as your main contact who you can talk to and who will also support you at regular intervals
- Reimburse all your out-of-pocket expenses. This includes additional costs for car insurance where relevant
- Provide you with support on a regular basis, either in person or by other means as negotiated between you and your volunteer lead
- Respect you as an individual by:
  - listening to your concerns and dealing with these promptly, this may include making decisions on tasks that are **not appropriate** for you
  - raising any concerns promptly that could affect you under our duty of care to you and our clients
  - keeping you updated on changes that may affect you in your volunteering including any changes to your role and/or services so you can make informed decisions about continuing with your volunteering
  - recognising your skills, dignity, and needs, and discuss changes with you to make suitable adjustments. This may include discussion with you to terminate your volunteering
- Celebrate the work of you and other volunteers across the organisation

**As a volunteer you will be expected to:**

- Participate in training to be able to undertake your tasks safely and to understand your responsibilities as a representative of Help & Care
- Read and ensure you understand the policies and procedures that affect you
- Ensure you have adequate car insurance if you are using your vehicle as part of your volunteering with us and provide evidence of this to Help & Care, through your local team
- Keep Help & Care , through your local team, updated if you are unavailable to undertake volunteering (on a one off or longer-term basis.) This includes dates you may not be available if you are away from home for any period
- Inform Help & Care, through your local team, of changes affecting your ability to carry out your volunteering
- Work safely to ensure that your actions do not adversely affect others and never do something that could cause loss or personal injury to yourself or a service user
- Treat all service users, Help & Care employees, and other volunteers as equal regardless of age, disability, gender reassignment, marriage & civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation
- Treat all service user details and personal information as confidential and store safely in line with the guidance provided to you
- Perform tasks reliably and to the best of your ability and refrain from acts or discussions that may damage the reputation of Help & Care
- Promote independence and prevent dependency by service users in how you carry out your volunteering. This will also include: -
  - Not returning to a service user to carry out additional tasks without consulting your staff contact
  - Not contacting a service user without prior agreement. No matter how good the intention this will be treated very seriously
  - Refusing gifts from service users or undertaking paid work or recommend others as you may be held responsible if anything goes wrong
  - Not giving service users your personal details
- Raise issues or concerns as they arise and take responsibility for your own behaviour. This may include discussion with us to terminate your volunteering
- Return any equipment and ID badges issued to you when you cease volunteering with Help & Care. Through your local team

**Signed on behalf of Help & Care Local team**

Name: (please print):

Date:

**Volunteer signature:**

Name: (please print):

Date:

**This agreement is in honour only and is not intended to be a legally binding contract. It may be cancelled at any time at the discretion of either party**

## APPENDIX C Problem Solving Procedure for Volunteers

Help & Care will do its best to ensure that everyone's experience of volunteering is a positive one. However, occasionally things can go wrong. A volunteer may have an issue about another volunteer or an employee of the organisation. Similarly, someone may have a concern about a volunteer's work, attitude, or conduct.

While employees have grievance and disciplinary policies, volunteers are not covered by employment or equal opportunities legislation. In fact, volunteers only have the same legal rights as the general public (e.g., Health and Safety and Data Protection), so a problem solving procedure helps to ensure that volunteers are treated fairly and are not discriminated against.

This problem solving procedure sets out how problems will be dealt with at Help & Care when they arise and help to find the most appropriate solution to a problem.

### 1. If a volunteer wants to raise an issue

This part of the procedure gives the volunteer the opportunity to raise their concerns if they have been unfairly treated, have an issue with their volunteering or about the organisation.

- **Stage 1: Oral process**

*The volunteer should discuss their concerns with their volunteer lead or manager of their service; if this is not appropriate, the matter should be discussed with a Senior Manager. If the matter cannot be resolved at this stage, then the volunteer should proceed to Stage 2.*

- **Stage 2: In Writing**

*The volunteer should detail their concerns in writing to the Director of Services or Director of Partnerships, Research & Influence; if this is not appropriate then this should be sent to another Senior Manager. The volunteer should share their written concerns **within a month** of the unresolved outcome of the oral process, to which the Senior Manager **will reply in writing within a month**, to allow for investigations or absences.*

- **Stage 3: Opportunity to Appeal**

*If the volunteer is not satisfied with the outcome of the written response, they can appeal to the Chief Executive. The appeal to the Chief Executive should be made **within a month** of receiving the written response. The Chief Executive will arrange to see the volunteer **within a month**. The volunteer can have a person present with them at this meeting. The Chief Executive will respond **within a month** of this meeting and their decision will be final.*

### 2. If someone wants to raise a concern about a volunteer

This part of the problem-solving procedure gives the volunteer the opportunity to be told why a concern has arisen, the opportunity to state their case and the chance to appeal.

- **Stage 1: Oral discussion**

*The first step is for the volunteer lead /service manager to discuss the concerns with the volunteer to establish their view of the situation. The staff member should establish whether external factors are affecting the volunteer's ability to carry out tasks, their behaviour, or their attitude. The staff member should identify goals that will help the volunteer to fulfil their role, offering extra support, supervision, and training where necessary, a deadline will be set to review the situation with the volunteer.*

If the concern was raised by someone else, the employee should keep them informed of the measures being taken to rectify the situation.

- **Stage 2: Written Warning**

*If the matter has not been resolved at Stage 1, the lead service manager will issue the volunteer with a written warning outlining reason for the concerns. The volunteer will be invited to state their case, either to the lead service manager or Director of Services or Director of Partnerships, Research & Influence. The volunteer can choose to be accompanied by a person of their choice. Depending on the nature of the concerns, this meeting may be used as an opportunity to set further objectives for the volunteer, or to offer training or other support. However, if at this stage the lead service manager or relevant Director decides that the volunteer should be asked to leave, the volunteer will be given the chance to appeal.*

- **Stage 3: Opportunity to appeal.**

*When a volunteer has been asked to leave, they may appeal in writing to the Chief Executive within a month. The Chief Executive will arrange to see the volunteer **within a month**. The volunteer can have a person present with them at this meeting. The Chief Executive will **respond within a month** and their decision will be final.*

### **Suspension**

There are some occasions when volunteers can be suspended immediately while an investigation is carried out. These include, but are not limited to, gross misconduct, e.g., theft, assault, acts of violence, malicious damage, deliberate falsification of documents, harassment, being under the influence of drink or drugs, allegations relating to any safeguarding matter whether within Help & Care services or not. The decision to suspend a volunteer will be confirmed to them in writing and, in some cases, legal proceedings may need to be concluded before the next step in the problem-solving procedure may take place.

### **Help & Care will: -**

- Treat all concerns and issues in confidence
- Allow enough time for meetings to take place and set realistic timeframes
- Keep volunteers informed at each step of the procedure
- Reassure service users involved that a concern does not affect their right to use a service
- Ensure volunteers have the right to be accompanied by a colleague, friend, or representative in any of the meetings

## **APPENDIX D Volunteer Expenses**

Help & Care will reimburse volunteers for all reasonable out of pocket expenses incurred in connection with volunteering undertaken on behalf of one of its teams.

This document sets out how to make a claim and what costs will be reimbursed.

All expenses for volunteers will be managed via claims forms that should be accompanied by receipts where they are available.

The claim form should provide as much detail as possible and can include travel, subsistence and other costs detailed below.

The claim should be preferably made online. If this is not possible, it can be made in hard copy after agreeing the logistics with the local team. All relevant receipts should be scanned or photographed and numbered if relevant.

All claims should be made each month if volunteering is regular or, if volunteering is ad hoc, at least every financial quarter (March, June, September, December)

The local team will be responsible for approving claims and forwarding to the central Finance team for payment.

Payment will usually be paid directly into the volunteer's bank account. Payment by other means is possible but will need to be agreed between Finance and the local team on a case-by-case basis.

Any PPE or other specialised equipment required to carry out the volunteering role will be purchased through Help & Care's Finance team.

### **What can be claimed for?**

#### *Public Transport*

Costs of bus journeys will be reimbursed. If volunteers travel by rail, they should generally travel standard class. The local team may wish to book tickets in advance. The same applies to ferry and coach travel.

#### *Use of own vehicle*

Each volunteer should take responsibility to ensure that their car is suitable for use for business purposes if it is to be used for volunteering activity. This requires checking that the car insurance policy is covered for occasional business use, to include commuting to and from volunteering activity. Additional costs that may be associated with adding business use to a policy can be reimbursed if agreed in advance with the local team.

#### *Accessible Transport/ taxi*

If a volunteer has concerns about using their own vehicle or has no vehicle, and public transport is not an option, a vehicle may be hired. The arrangements for booking and invoicing with the local provider should be agreed in advance with the local team.

#### *Mileage in own vehicle*

Where volunteers use their own vehicles for work-related journeys, a mileage allowance will be paid in line with HM Revenue and Customs rates.

The rate of mileage allowance for using your own car or van is 45p per mile, reducing to 25p per mile once annual work-related mileage has exceeded 10,000 miles in a year (commencing 1 April annually).

The rate of mileage allowance for using your own motorbike is 24p per mile and for using your own bicycle the rate of mileage allowance is 20p per mile.

#### *Subsistence*

Subsistence is an allowance to cover the cost of refreshments because of undertaking volunteering work. No subsistence allowance will be paid if refreshments are provided as part of the meeting attended or have been covered by the organiser of the activity. Current amounts that can be claimed are:

- up to £5 for breakfast if leaving home before 7 am
- up to £5 for lunch if away from home for more than 4 hours
- up to £15 for dinner if you are staying away from home or finish after 8 pm
- up to £3 per person for drinks if meet a client off-site

#### *Use of own phone and Internet*

Some volunteers may use their own phone/PC/Wi-Fi to undertake a particular piece of work. To acknowledge this, volunteers can claim £5 per task or small project to recognise these costs. This needs to be agreed with the local team in advance before a claim is authorised.

#### *Postage and Stationery*

Sometimes, volunteers are required to send letters/questionnaires or forms either to others or to the local team. These costs will be reimbursed with receipts supporting the claims.

#### *Additional Costs to support your Volunteering*

Sometimes there may be additional costs to enable someone to volunteer (e.g., carer or childcare costs; additional support). These costs can be covered, and the detail needs to be agreed with the local team before any claims can be made.

## **APPENDIX E                      EXIT INTERVIEWS**

Each service will be expected to offer a volunteer an exit interview should they leave the service/organisation.

This should be undertaken, where possible, before the volunteer leaves and a copy given to them and recorded on their personal file.

Any observations from the volunteer should be fed to the relevant service manager and relevant Director to make note of adjustments/changes that might need to be made either in the role or in how Help & Care's/ Healthwatch's processes affected them.

An outline of key questions to address in an exit interview is set out below.

- 1. *How did your experience of volunteering with us match up with your expectation of the role?***
- 2. *What were the most enjoyable aspects of your volunteering role?***
- 3. *What were the least enjoyable aspects of your volunteering role?***
  - a. *Would you have changed any aspect of the role?***
  - b. *Is there anything that we could have done differently?***
- 4. *What was your experience of support from staff and management?***
  - a. *Would you have welcomed any additional information/training? (if so, what?)***
  - b. *Did you feel your induction adequately prepared you for your role?***
- 5. *Were you able to talk to staff if you had difficult issues with your volunteering?***
  - a. *What was your experience of support with difficult issues?***
  - b. *Is there anything else that may have helped you in these circumstances?***
- 6. *Would you recommend this role to other volunteers?***
- 7. *Do you have any suggestions for improving the experience for volunteers in the future?***