



# Welcome to Guide Dogs

A dedicated introduction for volunteers



**Part three of three:**  
**Volunteering policies**

# Contents

## **1. Guide Dogs' policies you should know about 4**

Introduction .....	4
--------------------	---

## **2. Volunteering policy ..... 5**

Who is a Volunteer? .....	6
---------------------------	---

Key Principles.....	6
---------------------	---

1. Volunteer agreement.....	7
-----------------------------	---

2. Recruitment.....	8
---------------------	---

3. Induction, information and training .....	8
--	---

4. Support and Supervision .....	8
----------------------------------	---

5. Health and Safety .....	9
----------------------------	---

6. Expenses .....	9
-------------------	---

7. Having a voice .....	10
-------------------------	----

8. Safeguarding .....	10
-----------------------	----

9. Children and Young People.....	10
-----------------------------------	----

10. Diversity and Equality.....	11
---------------------------------	----

11. Confidentiality .....	12
---------------------------	----

12. Awards and Recognition .....	12
----------------------------------	----

Acceptance of gifts and gratuities .....	13
--	----

13. Resolving concerns.....	13
-----------------------------	----

## **3. Volunteer complaints procedure ..... 16**

Step One: Informal Discussion .....	17
-------------------------------------	----

Step Two: Formal Grievance .....	18
----------------------------------	----

Appeal .....	22
--------------	----

Final Review .....	23
<b>4. Procedure for resolving issues of volunteer behaviour, attitude or ability .....</b>	<b>25</b>
Step One: Informal Action .....	26
Step Two: Formal Action.....	27
Appeal .....	33
Final Review.....	35
Appendix 1 - Disciplinary Definitions.....	36
<b>5. Volunteer expense policy.....</b>	<b>39</b>
Main high level principles.....	39
Other Relevant Details.....	41
References and Related Documents .....	41
Appendix A: Expense Guidance Summary – All Volunteers .....	42
<b>6. Volunteer social media policy .....</b>	<b>45</b>
Social media policy for volunteers .....	45
1. Policy statement.....	46
2. Who is covered by the Policy? .....	47
3. Scope and purpose of the Policy.....	47
4. Personal responsibility for implementing the Policy .....	48
5. Guidelines for responsible use of social media .....	49
6. Personal use of social media in the office environment .....	53

One of the suggestions from the feedback in 2015 (there's a survey at the end of pack two) was that we split the pack into three parts. If you have not received them all, please tell us. The packs are:

1. Sight loss; our people; and keeping in touch
2. Our work and how we fund it
3. Volunteering policies.

## **1. Guide Dogs' policies you should know about**

### **Introduction**

In part two, we provided you with an overview of some of the key policies which impact on your role. The full policies are reproduced in their original formats here. Please ask your main Guide Dogs contact or the Volunteering Consultant at your local team office if you have any questions.

## 2. Volunteering policy

Volunteering policy

Unique Ref No: POLV5

People & Business Services Directorate

Volunteering Department

Owner: Lara Rivans

Job title: Head of Volunteering

Date Approved by Trustees: June 2011

Last Updated: October 2016

Reason: DBS name change and new directorate

Next Update Due: October 2019

Version: 1.4

### Volunteering Policy

Volunteers are essential to Guide Dogs. Volunteers bring passion, skills and commitment which support our mission:

**‘We will not rest until people who are blind or partially have the same freedom of movement as everyone else’**

This policy outlines what being a volunteer at Guide Dogs means and the key principles we work to as an organisation to ensure that our volunteers enjoy the best experience possible.

# Who is a Volunteer?

A volunteer is someone who gives their time to Guide Dogs. They do not receive payment except for out of pocket expenses.

There are no contractual obligations on volunteers. There are two main types of volunteers at Guide Dogs - Regular Volunteers and Occasional Supporters.

1. Regular Volunteers are recruited through our volunteer registration process and are asked to provide references and undergo a criminal disclosure check (DBS, Access NI or Disclosure Scotland) where appropriate to the role.
2. Occasional Supporters do not go through the full registration process. They complete a short form with their basic details.

Note: Occasional means fewer than 5 times per year. More regularly than this and a volunteer should be encouraged to fully register, entitling them to an ID card and regular communications.

## Key Principles

We involve volunteers in our activities because volunteers allow us to expand and improve our services by donating their time, skills and knowledge.

We can offer volunteers working with us the following:

- An opportunity to put existing skills and experience to good use
- An opportunity to learn new skills, knowledge and experience
- An opportunity to give back to society and contribute to our goals
- The chance to meet new, like-minded people
- Valuable experience for students, people looking to return to the workplace after a career break or those looking for an opportunity to try something new to add to their CV

## **1. Volunteer agreement**

All volunteers are provided with a volunteer agreement. The agreement covers what we can expect from volunteers and what they can expect of us – covering issues of mutual respect, confidentiality, etc. that are applicable to all volunteers. It reflects our values as a charity and supports staff and volunteers to apply these on a day-to-day basis.

The agreement is by no means a contract; it is simply a guideline to help the volunteer feel supported and clear about their responsibilities.

## **2. Recruitment**

A fully completed registration form is essential as part of the recruitment and selection process. All regular volunteers will complete an application form and will undergo 2 reference checks and a criminal disclosure check (DBS, Access NI or Disclosure Scotland) where appropriate for the role. Any advertising of volunteer roles will not discriminate in terms of race, gender or disability.

## **3. Induction, information and training**

We recognise that all our volunteers require training and the opportunity for development. We will provide induction, information, training and support to our volunteers that are appropriate to their volunteer role.

Volunteers will receive a two stage induction. The first stage, a general induction, will give volunteers all the relevant general information about volunteering for the organisation. The second will be a role specific induction offering the volunteer information and training to support them in the role they applied for.

## **4. Support and Supervision**

Guide Dogs recognise that volunteers give their time generously and their contribution should be mutually agreed. Volunteers will be supported and



supervised by a named contact person who may be a member of staff or a lead volunteer. This person will provide the volunteer with feedback on their work, the opportunity to discuss the future and a chance to discuss any issues that may arise. Volunteers can refuse demands they consider unrealistic, whether they are beyond the scope of the role or that they do not have the skills or time to carry them out.

## **5. Health and Safety**

Guide Dogs has a duty of care with regard to the health, safety and welfare of its volunteers. Volunteers will receive or be given access to relevant health and safety procedures and receive appropriate support and training during their induction.

## **6. Expenses**

We value our volunteers and want to ensure that there are no barriers to volunteers getting involved. Volunteers will be reimbursed 'out of pocket' expenses which have been genuinely incurred for business purposes and agreed with their line manager prior to being incurred.

## 7. Having a voice

Volunteers are encouraged to express their views about matters concerning the organisation and its work. This can be done through stakeholder meetings, consultative groups or raising issues with their staff contact.

## 8. Safeguarding

We are committed to ensuring that our volunteers are safely recruited and that recruitment is conducted in a way that is efficient, effective, fair and in line with our commitment to safeguarding and promotes diversity. In order to do this effectively, all volunteers who are recruited for roles involving contact with vulnerable groups will be required to undergo a criminal disclosure check (DBS, Access NI or Disclosure Scotland) and attend Safeguarding training.

All staff and registered volunteers will also be issued with a photo ID card on proof of identity during the registration process.

## 9. Children and Young People

Guide Dogs welcome young volunteers. The **minimum age requirement** for volunteers is currently 14 years old. Exceptions to this may be where there is a legal requirement such as around handling money or signing contracts or using machinery or

hazardous products. We will ensure all young people are supervised appropriately and only undertake tasks that have been matched appropriately to their age and capabilities. We will seek permission from a parent or guardian for anyone under 16. Staff and volunteers who supervise young volunteers must also be assessed regarding their suitability to work with young people. The Safeguarding Codes of Conduct for Children and Young People must also be read, understood and abided by. The Safeguarding Team will assess each volunteer role to determine the level of criminal disclosure check required. The volunteer recruitment process will ensure that the necessary disclosure checks are carried out for each volunteer whose role requires one.

## **10. Diversity and Equality**

In our commitment to value diversity within our organisation we recognise that there are differences in personality and attitudes of all the people involved (including employees, volunteers and service users) and the contribution they can make to the well-being and prosperity of blind and partially sighted people. Increasingly the organisation will benefit from the creativity and innovation that embracing diversity delivers. We are striving to create an environment and organisational culture which values people from all

sections of society and the contribution which each individual can make.

## **11. Confidentiality**

Some of our volunteers may deal with or encounter information and situations of a sensitive nature.

Volunteers must not disclose confidential or other classified information to unauthorised persons. All information and data relating to Guide Dogs' operations and personnel must be treated as confidential.

Volunteers must not publish literature, deliver any talk, or make any communication to the press, radio or television relating to Guide Dogs or any other matters in which Guide Dogs may be concerned, unless authorised by an appropriate staff member. Breach of confidentiality may result in your volunteer role being stopped.

## **12. Awards and Recognition**

Guide Dogs is committed to recognising the valuable contribution volunteers make. We feel it is important for excellence to be both encouraged and awarded.

Nominating volunteers who have made outstanding contributions in difficult conditions, highlights their achievements and showcases innovation and best

practice, which may inspire others to make their own contribution.

## **Acceptance of gifts and gratuities**

We recognise that gifts may from time to time be offered to volunteers in the course of their duties. Such gifts, if accepted, should never exceed £50 in value and must be notified to your line manager and be recorded by them for audit purposes. In addition, relationships can develop between a volunteer and someone who would like to leave a legacy in their will. Sometimes individuals wish to leave a legacy to an individual in their personal capacity, rather than to the charity. If a legacy is offered in a personal capacity, the volunteer must explain that he/she is obliged to disclose the gift to his/her line manager. Obviously, volunteers must not take advantage of their position to apply undue influence to solicit a personal legacy. For the avoidance of doubt, a volunteer can accept a legacy provided he or she has followed these instructions. Breach of these regulations will be considered as gross misconduct and may be liable to result in dismissal.

## **13. Resolving concerns**

It is important that the organisation is able to maintain its agreed standards of service to our

service users, and it is also important that volunteers should enjoy making their contribution to this service and that the time they give is the most effective it can be.

Volunteers have the right to raise an issue of concern to them. Once the matter has been brought to the attention of staff they have a responsibility to have the matter investigated and dealt with in a timely, fair and equitable manner. Guide Dogs aim to identify and resolve volunteer complaints at the earliest possible stage through Guide Dogs' Volunteer Complaints Procedure. Similarly, volunteer managers may raise issues with a volunteer, for example where actions or performance are not to the standard we would wish, or on those rare occasions we receive a complaint from a member of the public. Where the actions of a volunteer warrant serious concern, the Procedure for Resolving issues of volunteer behaviour, attitude or ability sets out how we will resolve the matter in a timely and objective way.

### **Sign-off:**

<b>Name</b>	<b>Position</b>	<b>Date</b>
<b>Lara Rivans</b>	<b>Head of Volunteering</b>	<b>October 2016</b>
<b>Jo Sullivan</b>	<b>Previous Head of Volunteering</b>	<b>June 2010</b>

## **Related Policies:**

Volunteer Expense Policy

## **Related procedures and documents:**

- Volunteer Agreement
- Volunteer Expenses Procedure
- Volunteer Complaints Procedure
- Procedure for Resolving issues of volunteer behaviour, attitude or ability
- Volunteering Behaviour, At Procedure
- Volunteer Awards and Recognition Handbook
- Volunteer Children and Young Persons Guidance
- Anti-bribery procedure
- Safeguarding Codes of Conduct for Children and Young People

### **3. Volunteer complaints procedure**

VOLUNTEER COMPLAINTS PROCEDURE (2016)

Unique Ref No: PROCV2

PEOPLE AND BUSINESS SERVICES DIRECTORATE

VOLUNTEERING DEPARTMENT

Owner: Lara Rivans

Job title: Head of Volunteering

Date Approved by Trustees: September 2010

Last Updated: Q4 2016

Reason: Review of process

Next Update Due: October 2019

Version: 3.5

#### **Volunteer Complaints Procedure**

Guide Dogs Volunteer Complaints Procedure is designed to enable volunteers who have a grievance arising from their volunteering activity with Guide Dogs to have the matter investigated and dealt with in a timely, fair and equitable manner.

Should the procedure for resolving issues of Volunteer Behaviour, Attitude or Ability (BAA procedure) be in progress, involving the same issues and people, the following Volunteer Complaints Procedure should be aligned with the next appropriate section of the BAA Procedure at the investigating manager's discretion. This will enable



the processes to run in a joined up manner, rather than running separate meetings and investigations. Guide Dogs take our charitable resources seriously; therefore on rare occasions we reserve the right to make a judgment to reject a complaint which lacks a sound basis, or where the relevant manager feels that a conclusive outcome will not be possible or appropriate.

## **Step One: Informal Discussion**

If a volunteer has a grievance affecting their role as a volunteer, they should first raise it with their line manager – the person who is their key contact and allocates or supervises their work. The only exception to this would be if the line manager is the person to whom the problem relates and the volunteer feels unable to raise the grievance with them, then the matter should be referred to their line manager's own line manager or other impartial staff member from the same or another local team who will discuss the grievance with the volunteer informally. The Volunteering Department can inform a volunteer who the appropriate manager is if required.

The volunteer's line manager should log the complaint on the Volunteer Complaints/BAA database and discuss the grievance with the volunteer informally to gain further information and

see what actions, if any, need to take place. It may be that the problem can be resolved without the need for a formal grievance being raised; if this is the case, the grievance needs no further action and should be marked as 'closed' in the system by the volunteer's line manager.

If during the discussion it becomes clear that the issue is more serious, the discussion should cease to allow for further investigation. The line manager should ask the volunteer if there are any witnesses or avenues of investigation they would like him/her to pursue.

- If any safeguarding concerns are suspected the line manager should telephone The Safeguarding Team on 08453727452, who will advise as to next steps.
- If any fraud or criminal activity is suspected the line manager should telephone a member of the Anti-Fraud and Criminal Activity Team (AFCAT) team, who will advise as to next steps.
- In these cases, this process may need to be suspended pending the outcome of a separate investigation.

## **Step Two: Formal Grievance**

If the informal discussion does not resolve the issue and the volunteer indicates that they wish to raise a normal grievance, this must be logged onto the

Volunteer Complaints/BAA database.

The volunteer should put the grievance in writing if it has not been done already. Alternatively the grievance should be summarised in the words of the volunteer, or read back to them and agreed as an accurate outline of their grievance within 5 working days of the case being logged. Volunteers should be sent a copy of this Volunteer Complaints Procedure.

## **2.1 Investigation**

The grievance investigation is confidential and will be undertaken with discretion solely by the investigating manager.

The Investigating Manager will ideally be the volunteer's line manager or another equivalent impartial staff member (as above). The Investigating Manager will study the facts surrounding a particular case, taking fact-based witness statements where required, within 15 working days of the case being logged.

## **2.2 Grievance Meeting**

A meeting should be arranged between the volunteer and the individual whom the grievance is against and/or another person where appropriate who can discuss the subject the grievance relates to. The Investigating Manager will act as facilitator, to discuss and try to resolve the grievance. The

Investigating Manager and the person who can discuss the subject the grievance relates to may in practice be the same person.

## **2.3 Before grievance meeting**

A date for the meeting should be arranged, at a time and location that is suitable to all parties, as soon as is reasonably possible and in any event within 20 working days of the complaint being logged.

The volunteer should be given at least 5 working days' notice of when and where the meeting will take place and be provided with all appropriate investigation documents. Similarly the volunteer should provide any written information about the case to the Investigating Manager prior to the meeting. If requested, and it is agreeable and convenient for both parties, the meeting may take place sooner.

If the volunteer wishes, they may bring along a third party for support, such as a friend, family member or fellow volunteer, not acting in a legal capacity.

If the volunteer refuses to come to the meeting without reasonable cause or justification then the complaint will be closed. No appeal is possible in this situation, as the meeting is a basic requirement to

resolve the issue.

## **2.4. During grievance meeting**

During the meeting, the volunteer will be supported to state their case. Ideally the complaint will be resolved in the meeting. If appropriate an action plan will be discussed between both parties by the Investigating Manager with a set timescale for review.

## **2.5. After formal grievance meeting**

A written summary of the meeting will be supplied to the volunteer within 10 working days of the date of the meeting, in their preferred format.

2.5.1 If all parties are content with the outcomes of the meeting no further action is required under this procedure and the complaint will be closed.

2.5.2 Alternatively the investigating Manager may identify actions to resolve the grievance, or extend the duration or scope of an existing action plan. To allow time for these actions to resolve the grievance, no appeal is possible until the period of the action plan has come to an end.

At the end of this time period the Investigating Manager should ensure actions are completed and arrange a follow-up call or face-to-face meeting with the volunteer. If the actions have been completed within the agreed timeframe and the matter resolved the grievance will be closed.

If the volunteer refuses to come to the review meeting without reasonable cause or justification then the grievance will be closed. No appeal is possible in this situation, as the meeting is a basic requirement to resolve the issue.

Confirmation of this follow-up call or meeting should be sent to the volunteer in their preferred format within 10 working days, with their right of appeal and name of Appeal Manager and a copy stored on the Volunteer Complaints/BAA database.

## **Appeal**

Appeals are an opportunity for the organisation to ensure we are making the right decision, and for volunteers to challenge ones they feel are incorrect. To achieve a balance of fair and objective decision-making and appropriate use of charity resources, appeals will not simply re-investigate all previous information for a second time.

If after the actions from the formal meeting have been reviewed, the matter remains unresolved, a statement from the volunteer should be submitted to the Appeal Manager clearly indicating the basis for the appeal, stating why the case has not been handled appropriately and/or presenting new information that wasn't considered previously. The Appeal Manager whom the volunteer should write to will be specified in the letter following the review meeting. Volunteers should send the appeal to the Appeal Manager within 10 working days of receiving the letter following the review meeting. The Appeal manager must log this on the Volunteer Complaints/BAA database. The Appeal Manager will decide if it is reasonable to continue and must review all previous information and investigate any new information relating to the appeal statement and respond within 15 working days of receiving the request for appeal. They should provide a summary of the investigation and their decision on the complaint in the volunteers' preferred format, including details of the Final Review stage.

## **Final Review**

If the volunteer is still not satisfied with the outcome of the appeal and has new information not considered in the Appeal previously that is significant and relevant, they must send this in their preferred format to the Head of Volunteering within

10 working days of the appeal decision.

The Head of Volunteering should review the new information and may at his/her sole discretion at this point liaise with an appropriate Trustee to consider the complaint. The outcome of the review of the new evidence will be communicated to the volunteer in their preferred format within 15 working days of Guide Dogs' receiving the request for Final Review.

If it is not possible to respond within the specified time period, the volunteer should be given an explanation of the delay and told when a response can be expected. The decision taken at this stage will be final.

**Sign-off:**

<b>Name</b>	<b>Position</b>	<b>Date</b>
<b>Lara Rivans</b>	<b>Head of Volunteering</b>	<b>April 2016</b>

**References and Related Documents**

- Procedure for Resolving Issues of Volunteer Behaviour, Attitude or Ability.
- Guidance Notes for volunteer line managers



## **4. Procedure for resolving issues of volunteer behaviour, attitude or ability**

Procedure for Resolving issues of volunteer behaviour, attitude or ability (2016)

Unique Ref No: PROCV3

PEOPLE AND BUSINESS SERVICES DIRECTORATE  
VOLUNTEERING DEPARTMENT

Owner: Lara Rivans

Job title: Head of Volunteering

Date Approved by Trustees: September 2010

Last Updated: Q4 2016

Reason: Review of process

Next Update Due: October 2019

Version: 3.5

### **Procedure for resolving issues of volunteer Behaviour, Attitude or Ability (BAA Procedure)**

Guide Dogs BAA Procedure is designed to help and encourage volunteers to achieve and maintain the required standard. It also ensures volunteers are dealt with in a fair and equitable manner.

Should a Volunteer Complaint be in progress, involving the same issues and people, the following procedure should be aligned with the next appropriate section of the Volunteer Complaints Procedure at the investigating manager's discretion.

This will enable the processes to run in a joined up manner, rather than running separate meetings and investigations.

## **Step One: Informal Action**

Any issues that may lead to disciplinary action should be dealt with by the volunteer's line manager. This includes issues of behaviour, attitude or competency.

An informal discussion between the volunteer and their line manager should take place to obtain further information and see if a resolution can be achieved.

Care should be taken not to allow an informal discussion to turn into a disciplinary hearing. If during the discussion it becomes clear that the issue is more serious, the discussion should cease to allow for further investigation. The line manager should ask the volunteer if there are any witnesses or avenues of investigation they would like him/her to pursue.

- If any safeguarding concerns are suspected the line manager should telephone The Safeguarding Team on 08453727452, who will advise as to next steps.
- If any fraud or criminal activity is suspected the line manager should telephone a member of the Anti-Fraud and Criminal Activity Team (AFCAT) team, who will advise as to next steps.

- In these cases, this process may need to be suspended pending the outcome of a separate investigation.

## **Step Two: Formal Action**

If the informal discussion does not resolve the issue or identifies that disciplinary action may be needed, the case must be logged onto the Volunteer Complaints/BAA Database by the investigating manager.

### **2.1 Investigation**

No disciplinary action will be taken without an investigation first being completed. The investigation is confidential and will be undertaken with discretion solely by the investigating manager. In cases of potential gross misconduct, and in consultation with the Volunteering Consultant, the volunteer's line manager may suspend the volunteer from their duties whilst the investigation is taking place.

The Investigating Manager will be the volunteer's line manager or another equivalent impartial person from the same or another local team where (in consultation with the volunteer manager's own line manager) another person is considered more appropriate. The Investigating Manager will study

the facts surrounding a particular case, taking fact-based witness statements where required, within 15 working days of the case being logged.

If the investigation shows that disciplinary action is not necessary the investigating manager will inform the volunteer.

## **2.2 Formal Meeting**

If the investigation suggests that disciplinary action is necessary the investigating manager will arrange a formal disciplinary meeting to address outcomes of the investigation and decide appropriate actions.

## **2.3 Before Meeting**

A date for the meeting should be arranged as soon as is reasonably possible and in any event within 20 working days of the case being logged.

The volunteer will be given at least 5 working days' notice of when and where the meeting will take place and be provided with all appropriate investigation documents including this BAA Procedure. Similarly, the volunteer should provide any written information about the case to the Investigating Manager prior to the meeting. If requested, and it is agreeable and convenient for both parties, the meeting may take place sooner.

The volunteer should be informed they have the option to be accompanied by a third party for support, such as a friend, family member or fellow volunteer, not acting in a legal capacity.

It is reasonable for a volunteer line manager to ask a member of their volunteer team to come to a meeting. If the volunteer refuses to come to any meeting in this procedure without reasonable cause or justification then Guide Dogs will have no option but to terminate their role as a volunteer. No appeal is possible in these situations, as meetings are a basic requirement to resolve the issue.

The decision to terminate a volunteer's role at any stage in the process will always be taken by the volunteer's line manager in consultation with the relevant Business Partner/Advisor and Volunteering Consultant. The decision will be confirmed in writing.

For those volunteers carrying out several roles, where the decision to terminate a volunteer's role is taken on the basis of a person's attitude or behaviour, Guide Dogs will cease accepting their volunteering in all roles. The only exception is where a volunteer's role is terminated due to physical capability (for example ill health prevents the volunteer carrying out a particular role to the standard required even

with the provision of reasonable support), but their commitment could be supported elsewhere.

## **2.4 During Meeting**

During the meeting, the volunteer will be given the opportunity to state their case and if appropriate an improvement plan will be discussed between both parties with a timescale for review.

If the volunteer refuses to agree to an improvement plan, Guide Dogs will have no option but to terminate their role as a volunteer. No appeal is possible in this situation, as the improvement plan is a basic requirement to resolve the issue.

## **2.5 After Meeting**

The Investigating Manager will contact the volunteer within 10 working days of the meeting:

If the investigation shows that disciplinary action is not necessary the investigating manager will inform the volunteer and close the case.

**In all other cases either** the volunteer will receive a copy of the improvement plan, with 5 working days to respond. A copy should be stored on the Volunteer Complaints/BAA Database.

**Or** the volunteer will be provided with reasons for the termination of their volunteering, the date this will cease, and the right of appeal where appropriate in their preferred format.

**Gross Misconduct:** In cases where Guide Dogs has reasonable grounds to consider there has been gross misconduct, Guide Dogs will have no option but to cease accepting the services of the volunteer with immediate effect.

**Improvement plans** should contain the reason for setting up the plan. It should set out the required improvement of conduct or standards, the timescale for the improvement and any support required. It should include points raised in the formal meeting and issues the Investigating Manager needed to investigate subsequent to the meeting, and state that failure to agree to the plan or meet set conditions will lead to Guide Dogs having no option but to terminate their role as a volunteer. Improvement plans will confirm that any disciplinary or grievance issues occurring within the timeframe of the Improvement Plan will be addressed through the review of the Improvement Plan, rather than instigating a separate procedure.

**Records retention:** In cases where a volunteer continues volunteering and informal or formal investigations were carried out, the period these records should be retained will be based on the

frequency of volunteering contact to demonstrate continued change. The volunteer must have the opportunity to demonstrate the required change. Records should not be held after a period of 3 years. The only exception to this will be where a permanent change was made to the nature of the individual's volunteering (for example that a certain role may not be undertaken).

## **2.6 Review**

At the end of the timeframe for improvement the volunteer's line manager should consult with their own manager and the Volunteering Consultant as to the outcome of the review period.

The volunteer's line manager should then arrange a meeting with the volunteer at a time and location suitable to both parties to assess whether conditions of the improvement plan have been met satisfactorily. If the volunteer refuses to come to this meeting without reasonable cause or justification then Guide Dogs will have no option but to terminate their role as a volunteer. No appeal is possible in this situation, as the improvement plan is a basic requirement to resolve the issue.

If the volunteer has met the conditions to the volunteer line manager's satisfaction, the disciplinary action will be closed.

A copy of the outcomes of the review should be sent to the volunteer in their preferred format within



10 working days of the meeting and a copy stored on the Volunteer Complaints/BAA Database.

If the conduct or performance of the volunteer has not met the standards set out in the improvement plan without good reason, then Guide Dogs will have no option but to terminate their role as volunteer.

The volunteer will be provided within 10 working days of the meeting with the reasons for the termination of their volunteering, the date this will cease, and the right of appeal where applicable, in their preferred format.

In cases of minor misconduct, action short of termination may be considered. This may include finding an alternative volunteering role within Guide Dogs.

## **Appeal**

A volunteer who wishes to appeal against the termination of their volunteering should inform the next level of manager not previously involved in the case within 10 working days of being informed of the termination of their volunteering. Where the right of appeal is available the Appeal Manager whom the volunteer should write to will be specified in the disciplinary letter.

Appeals are an opportunity for the organisation to ensure we are making the right decision, and for

volunteers to challenge ones they feel are incorrect. To achieve a balance of fair and objective decision-making and appropriate use of charity resources, appeals will not simply re-investigate all previous information for a second time.

A statement from the volunteer should be submitted to the Appeal Manager clearly indicating the basis for the appeal, stating why the case has not been handled appropriately and/or presenting new information that wasn't considered previously. The Appeal manager must log this on the Volunteer Complaints/BAA Database. The Appeal Manager will then review all previous information and investigate any new information relating to the appeal statement and then review the disciplinary penalty imposed.

The Appeal Manager may review the case without setting up a further meeting if he/she feels they have adequate information. If a further meeting is deemed to be necessary the volunteer should be informed they have the option to be accompanied by a third party for support, such as a friend, family member or fellow volunteer, not acting in a legal capacity.

Where an appeal has been held at an earlier stage in the process, any subsequent appeal will only consider events or information since that appeal. This is to prevent repetition and to best utilise Guide Dogs resources.

The outcome of the appeal will be confirmed to the volunteer in their preferred format within 15 working days of the appeal being received, including details of the Final Review stage.

## **Final Review**

If the volunteer is still not satisfied with the outcome of the appeal and has new information not considered in the appeal that is significant and relevant , they must send this in their preferred format to the Head of Volunteering within 10 working days of the appeal decision.

The Head of Volunteering should review the new information and may at his/her discretion at this point liaise with an appropriate Trustee to decide whether on consideration termination of the role is reasonable. The outcome of the review will be communicated to the volunteer in their preferred format within 15 working days of Guide Dogs' receiving the request for Final Review.

If it is not possible to respond within the specified time period, the volunteer should be given an explanation of the delay and told when a response can be expected. The decision taken at this stage will be final.

## Sign-off:

Name	Position	Date
Lara Rivans	Head of Volunteering	April 2016

## References and Related Documents

- Volunteer Complaints Procedure
- Guidance notes for volunteer line managers
- Improvement plan and letter templates

## Appendix 1 - Disciplinary Definitions

The following lists provide examples of offences which are normally regarded as gross, serious or minor misconduct. The lists are illustrative, and are not intended to be exhaustive. The procedure covers issues of attitude, behaviour, competency and actions:

### 1. Gross misconduct

- theft, fraud, and deliberate falsification of records
- fighting, assault on another person, or other physical violence
- mistreatment or cruelty to dogs, as defined by Guide Dogs
- serious bullying, violence, harassment or victimisation

- deliberate damage to Guide Dogs property
- serious act of insubordination
- misuse of Guide Dogs property or name
- bringing Guide Dogs into serious disrepute
- serious incapability whilst on duty brought on by alcohol or being under the influence of illegal drugs
- serious negligence which causes or might cause unacceptable loss, damage or injury
- serious infringement of health and safety rules
- any criminal conviction (if deemed relevant by the line manager)
- unauthorised entry to computer records
- deliberate access of internet sites containing pornographic, obscene or offensive materials
- serious or repeated occurrences of breaches of confidentiality
- unauthorised acceptance of gifts or gratuities

## **2. Serious misconduct**

- Failure to maintain the required standards of behaviour and general performance
- Repeated instances of minor misconduct
- Failure to carry out reasonable instructions from a supervisor or manager
- Failure to comply with Guide Dogs' rules, health and safety regulations, or any other Guide Dogs' operational requirements

- Misuse of Guide Dogs' facilities or equipment, including telephones, e-mail and the internet

### **3. Minor misconduct**

- Refusal to wear the right clothing or protective equipment provided
- Discourtesy to staff, other volunteers or to service users

## **5. Volunteer expense policy**

VOLUNTEER EXPENSE POLICY

VOLUNTEERING

PEOPLE AND BUSINESS SERVICES

Unique Ref No : VOLP3

Owner: Lara Rivans

Job title: Head of Volunteering

Last Updated: January 2017

Reason: Review of Policy

Next Update Due: January 2019

Version: 2.0

### **Volunteer Expense Policy**

Guide Dogs values the work carried out by volunteers and believes volunteers should not be out of pocket through their volunteering activities with Guide Dogs, except where travel costs are agreed to be part of the voluntary contribution to the charity.

This expense policy applies to all Guide Dogs registered volunteers.

### **Main high level principles**

- Expenses being claimed for must have been genuinely incurred for business purposes

- Volunteers who intend to claim expenses must have them agreed with their line manager prior to their being incurred.
- Claims should be submitted on a regular basis and within the relevant financial year (Jan-Dec).
- Volunteers claiming in excess of £20 per month should be reimbursed when possible via BACS payment directly into nominated bank or building society account. Where necessary expenses may be paid in advance.
- A valid receipt (preferably a VAT receipt) needs to accompany every expense claim. Credit card slips are not acceptable as proof of payment unless they are one and the same as a detailed receipt showing purchases.
- All necessary dog food, veterinary costs and equipment necessary to volunteering activity will be supplied and paid for by Guide Dogs.
- Telephone, postage, and other pre-agreed expenses necessary to the volunteering activity will be reimbursed if supported by appropriate receipts.
- With line manager approval, any travel to and from the place of a volunteering activity where not part of the voluntary contribution will be reimbursed.
- All public travel will be reimbursed at standard class for rail / coach fare and economy class for air fare. Drivers using their own vehicle will be



reimbursed at the same mileage rates applicable to staff.

- Food / beverages and accommodation necessary when volunteering activity takes place outside the normal geographical area, subject to prior agreement with a line manager and a minimum time commitment, will be reimbursed up to the limits in line with rates applicable to staff.

## **Other Relevant Details**

Volunteer expenses should be built into all funding applications or budgets as part of the regular costs of a volunteer programme.

## **References and Related Documents**

- Appendix A – All Volunteers Expense Amounts
- Appendix B – My Guide Volunteer Expense Guidance
- Appendix C – Puppy Walking and Brood Stock Holder Volunteer Expense Guidance
- Volunteer Expense Claim Form
- Guidelines for completing Expense Claim Form

## **Sign-off**

Lara Rivans, Head of Volunteering, 16<sup>th</sup> January 2017  
Jo Sullivan, Head of Volunteering, 21<sup>st</sup> April 2010

Jane Coope, Director of HR & Diversity, 21<sup>st</sup> April 2010

Council Approved, 27<sup>th</sup> January 2010

**We have added Appendix A (All Volunteers Expense Amounts) below. Please speak to your main Guide Dogs contact if you would like a copy of My Guide Volunteer Expense Guidance (Appendix B); Puppy Walking and Brood Stock Holder Volunteer Expense Guidance (Appendix C); and / or a claim form and completion guidance.**

## **Appendix A: Expense Guidance Summary – All Volunteers**

### **Travel Journeys**

- Travel should be agreed beforehand with your volunteer manager, and expenses can be reclaimed by submitting an expenses form.
- The most cost effective mode of transport should always be used unless otherwise agreed with your manager.
- Guide Dogs vehicles should be used for travel where possible.
- Private vehicle mileage can be paid at 40p per mile for the first 10,000 miles within the business year (6th April to 5th April), and 25p per mile thereafter. Claimants are responsible for keeping a running total of mileage.

- In cases where private car hire is required, this must be booked via a member of staff through Inchcape Fleet Solutions.
- All rail travel should normally be booked in standard class.
- Air travel may be required for some journeys. Where this is the case, economy class should be booked and 'no frills' airlines considered.

## **Accommodation**

- The overnight accommodation budget is £80 per night, including breakfast. The maximum budget for hotels offering a dinner, bed and breakfast is £98. An additional £16 per night is permitted where you are required to stay within Inner London.
- Expenses incurred at the hotel which are not covered by the current subsistence rates cannot be claimed on expenses, for example, mini-bar, laundry services, etc.
- Expenses incurred for informal accommodation (e.g. staying with a friend or relative) may be permitted (at your volunteer managers discretion), although it is expected these expenses would be lower than the rate of a B&B or commercial hotel. See further guidance within the policy.

## **Subsistence**

- A maximum £18 allowance for an evening meal is available to those who are required to stay away from home overnight, and are on Guide Dogs business the second day. A £5 lunch allowance would also be available on the second day only, and overnight accommodation if required due to travel restrictions.
- A lunch allowance of £5 maximum is available where duties require an extended day (start before 6am, finish after 8pm)

## **6. Volunteer social media policy**

VOLUNTEER SOCIAL MEDIA POLICY (2016)

Unique Ref No: VOLSOCIAL

PEOPLE AND BUSINESS SERVICES DIRECTORATE:  
VOLUNTEERING DEPARTMENT

Owner: Lara Rivans

Job title: Head of Volunteering

Date Approved by Executive Board: 22 August 2016

Last Updated: August 2016

Reason: New policy

Next Update Due: August 2019

Version: 1

### **Social media policy for volunteers**

Each and every one of us is an ambassador for Guide Dogs. Every word we say, whether it is written or spoken, has the power to make a direct and positive influence on the lives of the people in the UK living with sight loss. Social media is a fantastic way to do just that.

Guide Dogs use social media in its work and recognise that those who are involved in its work may also use social media either as part of their role or in their private lives. A written policy is therefore required for all staff, volunteers and stakeholders on the acceptable use of social networking.

Guide Dogs encourage the responsible use of social media. The purpose of this policy is to set out what Guide Dogs expect from our volunteers when using social media. It is important to remember that we are all ambassadors for the charity and that social media is never private.

This policy is solely for volunteers and aims to:

- give clear guidelines on what volunteers can say about the organisation online;
- comply with relevant legislation and protect volunteers;
- help volunteer managers manage performance effectively;
- help volunteers draw a line between their private lives and their volunteering;
- protect Guide Dogs against liability for the actions of volunteers;
- be clear about sensitive issues such as monitoring and explain how problems with inappropriate use will be addressed.

## **1. Policy statement**

1.1. Guide Dogs recognise that the internet provides unique opportunities to participate in interactive discussions and share information on particular topics relevant to our work using a wide variety

of social media, such as Facebook, Twitter, LinkedIn, blogs and wikis etc. This policy aims to protect individuals volunteering with us in any role and to encourage individuals to take responsibility for what they write and to exercise good judgment and common sense.

- 1.2. Inappropriate use of social media can pose risks to our confidential and proprietary information and reputation, and can jeopardise our compliance with legal obligations. To minimise these risks, to avoid loss of work time and to ensure that our IT resources and communications systems are used only for appropriate business purposes, we expect volunteers to adhere to this policy.

## **2. Who is covered by the Policy?**

- 2.1. This policy covers volunteers including trustees. There is a separate policy for paid staff.

## **3. Scope and purpose of the Policy**

- 3.1. This policy deals with the use of all forms of social media, including Facebook, YouTube, Twitter and all other social networking sites, and all other internet postings, including blogs.

- 3.2. It applies to the use of social media both for volunteering and personal purposes, whether while volunteering or otherwise. The policy applies regardless of whether the social media is accessed using our IT facilities and equipment or equipment belonging to volunteers.
- 3.3. If a volunteer does not follow the guidance set out in this policy their volunteer manager will address this using the Procedure for Resolving Issues of volunteer behaviour, attitude, or ability.
- 3.4. Volunteers may be required by Guide Dogs to remove internet postings which are deemed to constitute a breach of this policy.
- 3.5. This policy links to all other policies therefore social media should never be used in a way that breaches any of our other policies such as equal opportunities, data protection etc; this list is illustrative, not exhaustive. Please refer to the Volunteer Information Point or your volunteer manager for further guidance on other policies.

## **4. Personal responsibility for implementing the Policy**

- 4.1. All volunteer managers have a specific responsibility for ensuring that all volunteers



understand what is expected of them and taking action whenever this policy requires.

- 4.2. All volunteers should ensure that they take the time to read and understand this policy. Any misuse of social media or questions regarding the content or application of this policy should be reported to their volunteer manager or staff contact.
- 4.3. Any content which raises a safeguarding concern must be reported to the Safeguarding Team or your volunteer manager in line with Safeguarding Policy.

## **5. Guidelines for responsible use of social media**

The following sections of the policy provide volunteers with an outline of how we expect you to use social media responsibly and safely.

- 5.1. Volunteers must not post negative statements about:
  - a. Guide Dogs or its subsidiaries;
  - b. Guide Dogs' staff, our service users, volunteers or members past or present;
  - c. suppliers and vendors; and
  - d. other affiliates and stakeholders.

Volunteers should also avoid social communications that might be misconstrued in a way that could damage our reputation, even indirectly.

- 5.2. Volunteers are personally responsible for what they communicate in social media (as part of their role or on personal sites). Remember that what you publish might be available to be read by the general public, colleagues, volunteers, future employers and social acquaintances for a long time. Keep this in mind before you post content.
- 5.3. A publicity consent form to use third party data including photographs must be obtained prior to posting images or text of those individuals before they may be used on social media in relation to Guide Dogs. To discuss how to adhere to this in crowded places or if you need a copy of this form, please ask your volunteer manager.
- 5.4. Guide Dogs does not permit tagging of vulnerable adults or anyone aged 17 or under. If you would like to post about anyone under the age of 17, you must ensure you have their parent or guardian's permission to do so.
- 5.5. There is no obligation for volunteers to link their personal social media to any Guide Dogs' social media.

- 5.6. Volunteers must not set up social media accounts for Guide Dogs' work purposes without prior agreement from their volunteer manager who in turn will need consent from the Communications Department.
- 5.7. If your social media accounts say that you are a Guide Dogs' volunteer, you must also state that your views do not represent those of the organisation you are volunteering with. For example, you could write, "the views in this posting do not represent the views of Guide Dogs." You should also ensure that your profile and any content you post are consistent with the image you present to those you work with as part of your volunteering role.
- 5.8. You can only use a Guide Dogs' email address for social media if your volunteering role involves using social media on behalf of the organisation.
- 5.9. You are responsible for the security settings of any social media sites you use and should ensure they are set to the appropriate level if you wish to limit who can see your information.
- 5.10. Remember that you must respect confidentiality at all times and protect confidential information. You should be mindful

of Data Protection issues, if in doubt speak to your Volunteering Manager or the Data Protection Officer. Confidential information includes things such as unpublished details about our work, details of current projects, future projects, financial information or information held on our supporters, staff or volunteers.

- 5.11. Avoid posting comments about sensitive Guide Dogs' related topics, such as an individual grievance or complaint. Even if you make it clear that your views do not represent those of our charity, your comments could still damage our reputation.
- 5.12. If you are uncertain or concerned about the appropriateness of any statement or posting, refrain from making the communication until you discuss it with your volunteer manager.
- 5.13. If you see content in social media that disparages or reflects poorly on Guide Dogs or our stakeholders, you should report it to your volunteer manager.
- 5.14. Those business contacts made during the course of your volunteering, which may be used by you in a new role to put Guide Dogs at a disadvantage, are regarded as our confidential information, and as such you will be required to

delete all such details from your personal social networking accounts should you finish volunteering with Guide Dogs.

## **6. Personal use of social media in the office environment**

We recognise that volunteers may occasionally want to use social media for personal activities if their role requires them to spend time in an office or use our computers, networks and other IT resources and communications systems. We authorise such occasional use during rest breaks so long as it does not involve unprofessional or inappropriate content and does not interfere with your volunteering role or disrupt the corporate or guest Wi-Fi capability. You should not use Guide Dogs IT resources and communications systems for any matter that you wish to be kept private or confidential.

If using social media on Guide Dogs' IT equipment while volunteering, circulating chain letters or other spam is never permitted; circulating or posting commercial, personal, religious or political solicitations, or promotion of outside organisations unrelated to Guide Dogs work is also prohibited.