

# VOLUNTEER Handbook

Everything you need to know about volunteering for Healthwatch Bath and North East Somerset (BaNES), Healthwatch Swindon and Healthwatch Wiltshire (Healthwatch BSW)





# WELCOME

Welcome to Healthwatch BSW. We are so thankful to you for giving your time and energy to volunteer with us, your support is invaluable. We hope you will have an enjoyable and rewarding time with us, and meet new people whilst providing a voice for our community.



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# 1. Welcome to Healthwatch

## **A message from the Chief Executive Officer, Kevin Peltonen-Messenger**

'The Care Forum has been awarded the Healthwatch contract for Bath and North East Somerset (BaNES), Swindon and Wiltshire.

Healthwatch will give children, young people and adults a powerful voice locally and will help people to get the best out of their health and social care services. Every voice counts when it comes to shaping the future of health and social care, and when it comes to improving services. Healthwatch will bring the voice and influence of local people to the development and delivery of health and social care services.

Healthwatch makes health and social care providers answerable to the community because our Healthwatch volunteer champions speak up on behalf of the community and their needs.

As you have signed up to be one of the Healthwatch volunteer champions, I would like to take this opportunity to thank you for giving your time to work with us to ensure all services work together to create an integrated and efficient health and social care system.'

*Kevin Peltonen-Messenger*

Chief Executive  
The Care Forum

## **How to use this handbook**

This handbook is a useful reference tool, so please take the time to read it and keep it in a safe place so you can refer to it in the future. It gives you background as to who we are and what we do, an understanding of the roles and responsibilities of our volunteers and a summary of our policies and procedures that we have in place to support and protect you.

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## Meet the staff team

Kevin Peltonen-Messenger  
Chief Executive of The Care Forum

### Bath and North East Somerset Team

- Amritpal Kaur – Portfolio Manager
- Camille Lovgreen – Volunteer Support Officer
- Sue Poole – Development Officer

### Swindon Team

- Amritpal Kaur – Portfolio Manager
- Ryan Herbert – Volunteer Support Officer
- Joesphine Fliski – Development Officer

### Wiltshire Team

- Amritpal Kaur Portfolio Manager
- Kate Barber Volunteer Support Officer
- Tash Thornton Engagement Officer
- Jo Sollars Project Engagement Officer
- Daren Gordon Project Engagement Officer

Healthwatch BSW is made up of three independent local Healthwatch organizations: Bath and North East Somerset (BaNES), Swindon, and Wiltshire. These groups are hosted by The Care Forum, a provider of health and social care services. As the host, The Care Forum (TCF) supports and oversees the work, priorities, and goals of Healthwatch BSW.

Each Volunteer Support Officer from the respective Healthwatch group will look after volunteers in their own area.



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## About Healthwatch

**Healthwatch is a local, independent champion for people who use health and social care services.**

Our purpose is to listen to people's experiences of using services and to speak out on their behalf. We collect and analyse people's experiences and views to ensure that the people who run services know what works and what doesn't. We also help people find the information they need to access health and social care services in their local area. Every local authority area has its own local Healthwatch to enable people to share their views and concerns about local health and social care services. The Care Forum holds the contract for Healthwatch in:

- Bath and North East Somerset
- Swindon
- Wiltshire

## What more...

Healthwatch has a statutory place on the health and wellbeing board, sharing evidence and feedback on what local people think about their health and social care services to ensure that these services meet the needs of, and are shaped by local communities.

Healthwatch works on behalf of the whole of the community and needs patients to tell it what's going on in the health and social care services in their area. Healthwatch can tell services about patient experiences of care and hold them to account; it can also enter and view services and observe what is happening to report back to commissioners.



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## There are three key aspects to our work

### **Voice**

Ensuring local people's voices are heard and their experiences can influence the design, commissioning and delivery of local health and social care services.

### **Scrutiny and accountability**

Holding those who plan and commission local services to account through our involvement in the Health and Wellbeing Board, our reports and recommendations, our power to enter and view services and our ability to refer issues of major concern direct to Healthwatch England or the local Health Scrutiny committee and the Care Quality Commission.

### **Information and signposting**

Providing an Information and Signposting service to provide information about local health and social care services to help people make informed choices about what's best for them. Also providing information and signposting to people wishing to complain about health and care services.

Our values: In everything we do, we are transparent, non-judgemental, and independent. We are dedicated to co-production and strive for continual improvement.

We adhere to the Nolan Principles, also known as the Seven Principles of Public Life. This means that we carry out our work with selflessness, integrity, objectivity, accountability, openness, honesty, and leadership.

## History of Healthwatch

The health and social care reforms of 2012 set a powerful ambition to put people at the centre of health and social care. As a result of these reforms a national body, Healthwatch England, was created, as well as one in every Local Authority area across England (152 in total).

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## How we work

We believe that Healthwatch can only be truly effective if we can reach as many people as possible, so we work with established networks, groups and organisations in BaNES, Swindon and Wiltshire.

Our approach to being effective is underpinned by creating a 'network of networks' which:

- Builds strong links with local voluntary and community groups.
- Uses established community networks to share information, and to find out what matters to people.
- Works collaboratively with local partners who have strong local knowledge and connectivity with communities of interest and can support our work in obtaining the views of these communities.
- Builds a bank of trained volunteers who can be the eyes and ears of Healthwatch at grass-roots level.
- Champions the voices of those who are seldom-heard and those who experience poorer health and social care outcomes than others





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## 2. Code of Conduct & Policies

### Code of Conduct

The Code of Conduct is a set of guidelines that all Healthwatch volunteers need to follow to ensure they are representing their Local Healthwatch appropriately and effectively. This Code should complement The Care Forum's Volunteer Agreement.

### The Seven Principles of Public Life

Healthwatch volunteers are asked to use the Nolan Principles as set by the Committee on Standards in Public Life to guide their actions, these are:

**Selflessness** – Holders of public office should act solely in terms of the public interest.

**Integrity** – Holders of public office must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships.

**Objectivity** – Holders of public office must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias.

**Accountability** – Holders of public office are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this.

**Openness** – Holders of public office should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing.

**Honesty** – Holders of public office should be truthful.

**Leadership** – Holders of public office should exhibit these principles in their own behaviour. They should actively promote and robustly support the principles and be willing to challenge poor behaviour wherever it occurs.

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## Equality and Diversity

Individuals must not discriminate against people they come into contact with during their role with Healthwatch, on the basis of their ethnic origin, gender, gender identity, sexual orientation, religion, disability, age, colour, family circumstances, working arrangements, social class, national or social origins, political or other opinions. We are all different and it is expected that this diversity will be respected and welcomed.

## General conduct

It is important that Healthwatch volunteers conduct themselves appropriately at all times when they are representing local Healthwatch and its views. We expect volunteers to promote Healthwatch and The Care Forum in a positive light at all times.

## Behaviour during Meetings

The behaviour of participants at a meeting is important to the success of the meeting. Some people may lack the confidence to express themselves fully in a meeting with other people, whereas others may have greater confidence and or experience and may not limit their contributions appropriately. It is important that all contributions are equally valued while limited such that the meeting is successful and everyone has a chance to contribute who wishes to.

It is very important that decisions taken in meetings are well informed by having appropriate, accurate information and debate on the topics concerned. One of the most important areas of appropriate behaviour during meetings, in addition to the above, relates to declarations of interest.

## Declarations of Interest

At meetings the Chair may ask individuals in attendance to declare whether they have any personal, financial or other material interest in any item on the agenda. (More detailed information about what kinds of areas may constitute a Conflict of Interest can be found in The Care Forums Conflict of Interest Policy.)

## Confidentiality

Some meetings may occasionally receive information, which is not in the public domain often relating to individuals, organisations or financial matters. All information must be shared with Local Healthwatch according to The Care Forum Confidentiality policy. Volunteers must never use confidential information for their personal advantage or to the advantage or disadvantage of anyone known to them or to disadvantage or discredit the organisation.

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## Hospitality and Gifts

Volunteers should be careful not to accept any gift or hospitality which might interfere with or be perceived as interfering with Healthwatch business or services. This does not include gifts of minor value such as pens or calendars, or working lunches or functions attended in an official capacity. However, any other gifts or hospitality offered should be reported to the Volunteer Support Officer who will then determine with the relevant manager the action to be taken.

## Publicity

Any opportunities to promote Healthwatch and the roles of volunteers in the local community are welcomed. However, volunteer wishing to produce articles for a newsletter, website, notice board etc must first pass it to our marketing and communications team to ensure it meets our style guide and accessibility policy as well as uses the right logos and images.

## Breaches of the Code

Any breach of this code of conduct will be brought to the attention of the TCF Board and dealt with in line with our problem solving procedure (details of this procedure can be found in the Volunteer Handbook) and could result in the removal of a volunteer from the organisation.

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# Policies

## Policies are in place to:

- protect staff, volunteers and service users;
- ensure compliance with legislation;
- ensure consistency and equality in service delivery.

## The policies which are relevant to these roles are:

- Safeguarding
- Confidentiality
- Equal Opportunities
- Volunteer Policy
- Expenses
- Problem Solving Procedure
- Health & Safety

## Safeguarding Policy

### Statement of Intent

The Care Forum recognises that vulnerable adults and children have rights as individuals and should be treated with dignity and respect. The organisation is committed to ensuring that vulnerable adults and children who use our services are protected and that they are not subjected to exploitation or abuse.

### 1. The Law

This policy is governed by a number of laws including:

- The Children Act 1989 and amendments
- Safeguarding vulnerable adults 2006
- Human Rights Act
- The Care Act 2014

### 2. Principles

These policies and procedures are based on the following principles:

- The welfare of children and vulnerable adults is of primary concern
- All children and vulnerable adults, whatever their age, culture, impairment, gender, racial origin, faith, sexual orientation and socio-economic status, have the right to safeguarding from abuse
- All incidents of alleged poor practice, misconduct and abuse will be taken seriously and responded to swiftly and appropriately. All personal data will be processed in accordance with the requirements of the Data Protection Act 1998.

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### 3. Definitions

- a. A **vulnerable adult** is any person who is 18 years and over who:
- is or may be in need of community care services by reason of mental or other impairment, age or illness and who is or may be unable to take care of him/herself (perhaps by being dependent upon someone else for care) or unable to protect him/herself against significant harm or exploitation
- b. A **child** is a person under the age of 18.
- c. **Significant harm** is defined as 'ill treatment including sexual abuse and forms of ill treatment that are not physical; the impairment of, or avoidable deterioration in, physical or mental health; and the impairment of physical, intellectual, emotional, social or behavioural development.
- d. **Risk** refers to situations or behaviours which present a real or potential threat of harm to a person's health, development, safety or well-being. Vulnerable people can be at risk because of the actions or behaviour of others or they can be at risk because of self-neglect, their behaviour and lifestyle. Children can be at risk because of the actions or behaviours of others.
- e. **Abuse** is a violation of an individual's human and civil rights by any other persons(s) or group of people. Abuse may consist of single or repeated acts. It can be:
- Physical: for example, hitting, slapping, burning, pushing, restraining or giving too much or the wrong medication.
  - Possible indicators: frequent minor injuries or bruising; weight loss; neglected appearance / poor hygiene; change in eating patterns / loss of appetite.
  - Psychological and emotional: for example, shouting, swearing, frightening, blaming, ignoring or humiliating a person. (This includes discriminatory abuse).
  - Possible indicators: helplessness; hesitation to talk openly in front of carer; unexplained fearfulness; uncommunicative; carer anger, implausible stories, sudden change in behaviour.
  - Financial: for example, the illegal or unauthorised use of a person's property, money, pension book or other valuables.
  - Possible indicators: lack of funds, symptoms of malnourishment, poor clothing hygiene standards
  - Sexual: for example, forcing a person to take part in any sexual activity without his or her informed consent – this can occur in any relationship.
  - Possible indicators: fear of physical contact, nervousness, not being able to look someone in the eye, bruising, symptoms of pain in areas of the body which are clothed, inappropriate behaviour.

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f. **Neglect** and acts of omission can be deliberate or unintentional, amounting to abuse by a carer (formal or informal) or self neglect by the vulnerable person: for example, where a person is deprived of food, heat, clothing or comfort or essential medication.

- Possible indicators: poor personal hygiene; health and safety hazards in home; inadequately clothed; malnourished / dehydrated; unsanitary living conditions; inadequate food in home.

Repeated instances of poor care may be an indicator of institutional abuse.

#### 4. **Confidentiality**

- No member of staff should discuss confidential information more widely without first discussing with the designated officer.
- Though The Care Forum policies contain confidentiality clauses, it must be stressed that where abuse to a service user is alleged, suspected, reported or concerns are raised, management must be notified.
- The service user should be made aware that staff cannot ignore issues around abuse and that steps will be taken to deal with them in as sensitive a manner as possible.
- Staff should avoid promising confidentiality to a vulnerable adult in advance of a disclosure being made.
- The confidentiality of the vulnerable adult should be respected wherever possible and every effort made to secure their consent prior to sharing information. However, there may be instances where risk of harm to that individual or another individual means that it is right to share information without consent. In such circumstances, advice can be obtained from the designated officer.
- If Social Services are already aware of abusive situations and are taking action, staff and volunteers are expected to adhere to The Care Forum's confidentiality policy. However, in the event of abuse being disclosed to a staff member or volunteer, and where Social Services have not previously been informed, this policy supersedes confidentiality in order to uphold the law. The welfare of the individual is paramount.

#### 5. **Recruitment of staff and volunteers**

The Care Forum will always ensure that enhanced Criminal Records Bureau checks are obtained for any member of staff or volunteer who will be working with vulnerable adults and or children. No employee or volunteer will be permitted to work alone with vulnerable adults or children without a DBS check.

Two references for new staff will be obtained. Save in exceptional circumstances, one of the referees will be required to be the most recent employer with whom the candidate was employed in a role which involved working with vulnerable adults and/or children as may be relevant.



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## 6. Designated Officers

The Care Forum will appoint the Chief Executive and the Director of Services as the joint Child Protection Officer and Vulnerable Adult Safeguarding officer. Their responsibilities are to:

- Receive information from line managers, or in their absence, from staff and volunteers about any concerns regarding abuse of vulnerable adults or children
- Assess the information promptly and carefully, clarifying and obtaining more information about the matter as appropriate
- Consult with the appropriate safeguarding agency
- Record statements from staff and volunteers.

If neither of the joint designated officers is available, the line manager or other available manager will act as the designated officer until one of the joint designated officers is available.

Despite the specific responsibilities of the designated officers, all staff have a shared responsibility for the safeguarding and safety of all vulnerable adults and children who use the services of the organisation. Safeguarding issues should be brought to the attention of the Chair.

## Safeguarding policy – procedure

### 1. Action to take when abuse is disclosed or concerns are raised

- Listen carefully to the person and reassure them that they are believed
- Give them plenty of time to speak
- Sensitively ask open questions (not leading ones) to obtain key information:
  - What has happened?
  - When?
  - Where?
  - Who was involved?
  - What would you like to happen?

NB, in the event of a serious criminal allegation, you should record the information volunteered, but refrain from probing further as this may prejudice the police investigation.

- Discuss and explain the application of the safeguarding and confidentiality policies
- Discuss what action the person wants to be taken and explain what action you have to take
- Ensure that the person knows how to contact the police to report the incident if they wish to
- As soon as possible, make notes of your discussion and action taken

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**2. When abuse concerning a child is suspected or reported, the following action should be taken by staff or volunteers**

- Remind the person who is about to disclose important information that it may not be kept confidential has disclosed the information that it cannot be kept confidential and that it may have to be passed to the appropriate agency
- Inform the line manager as soon as possible but within 24 hours
- The line manager must inform the Chief Executive or the Business Support Co-ordinator, who will contact Social Services so that the information can be passed to the Local Authority Designated Officer
- The person who has disclosed the information will be informed that this has happened and what is likely to happen. A full detailed record of the suspected or alleged abuse must be made.

**3. In the event of abuse being reported or suspected in relation to a vulnerable adult**

- A decision should be made, in discussion with the line manager, as to whether the person in question is vulnerable according to the definition used in this policy and whether the signs and symptoms which have raised the suspicions constitute abuse or neglect
- The facts should be carefully checked and if it is decided that there has been abuse, the person who is the subject of the concerns should be made aware of the process where it is possible. The line manager must inform the Chief Executive or the Business Support Co-ordinator and the appropriate agency must be contacted. If the neither of the joint designated officers are available, the line manager or another available manager should act as the designated officer.
- A full detailed record of the suspected or alleged abuse must be made and stored in a secure location by the Chief Executive. (Refer to the document retention policies for timescales)

**4. If the person asks that no action be taken**

- It must be explained that the line manager must be informed and that they will be advised that the person does not want any action to be taken
- Apart from circumstances involving a child, no action will be taken if the abused person has requested this and is considered not to be at risk of significant harm unless:
- The alleged abuse has been perpetrated by a professional, a paid helper or volunteer of any organisation who may have access to other vulnerable people
- There is the likelihood of a serious crime occurring
- The client lacks the mental capacity to make an informed decision.
- In the case of a child, it may be necessary to have a discussion with the parent/carer.

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Should the person who has been abused meet any or all of these criteria, then a discussion with the line manager should take place and a decision reached whether to take the actions outlined in paragraph three. Any decision reached should be recorded with the reasons and evidence for the decisions.

## 5. Support for staff and volunteers

It is recognised that dealing with allegations of abuse may be distressing. The Care Forum will offer staff as much support during the process as resources permit. Service users will be informed of the Safeguarding Policy to provide clarity with regard to The Care Forum's obligations under the policy.

If allegations are made against a staff member or volunteer of The Care Forum, the following actions will be taken:

- The volunteer/staff member who is the subject of the allegations will be removed from the case/service and a replacement allocated
- The Care Forum will ensure that Social Services are given assistance to enable them to carry out an investigation
- The volunteer/staff member at the centre of the allegations will receive support from their line manager
- Where appropriate and necessary, Disciplinary Procedures will be implemented.
- The rights of staff under Grievance and Disciplinary procedures will still apply.

## 6. Staff training

- The Care Forum will ensure that all its staff and volunteers who have direct contact with vulnerable adults and children have relevant training in the recognition of abuse and understand how to use the procedures as laid out in the Safeguarding Policy and alert other appropriate staff.
- The Care Forum will ensure staff and volunteers are aware of the legal protection afforded by the Public Interest Disclosure Act 1988 (protection from unfair dismissal or victimisation for whistle blowing on poor or abusive practice by colleagues).

## Confidentiality Policy

For the purposes of this policy, the term 'staff' refers to members of the Board of Trustees, staff members and volunteers. The term 'service user' refers to individuals and groups who use the services of The Care Forum.

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Confidential information is defined as ‘information which relates to a staff member or service user who can be identified from that information. This includes expressions of opinion but excludes information relating to TCF’s service intentions in respect of that staff member or service user.’

## **1. Statement of Intent**

The Care Forum fosters mutual trust between members of its Board of Trustees, staff, volunteers, individuals and groups who use its services and funders.

## **2. The Policy**

### **a. General**

- All staff and service users should be aware of The Care Forum’s commitment to confidentiality, and have confidence in the professionalism of the service being provided.
- The Confidentiality Policy will be available to staff and service users. Where appropriate, service users will be informed of the policy and will be helped to gain an understanding of the implications of it before using a service.
- Staff members have a duty to respect confidential and personal information concerning staff and service users.
- The Care Forum will not disclose confidential information about staff or service users to any other individual or organisation without their prior consent. Such information will remain confidential within The Care Forum service concerned.
- Staff may need to discuss confidential or personal information relating to a service user with their line manager as part of their own supervision and support, although the discussion will remain confidential.
- Staff will not put pressure on service users to disclose information if they are unwilling to do so – unless there are extenuating circumstances – see Special Exceptions.
- The Care Forum will support staff in the implementation of the confidentiality policy through induction, training and supervision.
- The Care Forum is committed to being responsive to change and to ensuring that this policy and its implementation is reviewed and revised regularly.

### **b. Informed consent**

- The Care Forum will discuss with the staff member or service user concerned why there is a need to share information, with whom, and what the likely consequences will be if consent is or is not given.
- The Care Forum will respect the wishes of staff and service users to restrict details to be shared about them.
- Confidential information will only be disclosed to a third party only with prior consent from the staff member or service user, unless there is a safeguarding issue.
- Reports to funders will not disclose confidential information about any service user unless the identity of the service user is already known to the funder

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### c. Special Exceptions

- Information will generally not be passed on to other agencies except where specifically requested by the staff member or service user. However, there are special circumstances where this may occur without the prior consent of the individual concerned. These are deemed to be situations of high risk for individuals:
  - **i. Children and Vulnerable Adults**  
The Children Act (1989) states that the 'welfare of the child is paramount'. Staff have an obligation to report any concerns they may have based on information disclosed to them or suspicions they may hold, where a child or vulnerable adult may be deemed to be at risk or have been at risk. This includes disclosure by an adult of their own 'historical' abuse, where the abuser is clearly identified and may currently put children at risk (see TCF Safeguarding Policy).
  - **ii. Risk of harm to self or others**  
The Care Forum has an obligation to report to a relevant agency where they are aware that an individual may be at serious risk of harming themselves or another person.
  - **iii. Prevention of Terrorism Act**  
The Care Forum has a legal responsibility to inform the police where information about terrorist activities is disclosed.
  - **iv. Criminal activity**  
No staff member or volunteer will knowingly assist or collude with any criminal activity, whether directly involved or indirectly through collusion.

The need for a disclosure of information of any nature should be communicated to the staff member or service user concerned whenever possible. The Care Forum will offer support and encouragement to the staff member or service user to divulge information to the relevant agencies themselves. However, if the service user is unwilling to do so, then the worker will inform them that such information will be passed on and to whom, as appropriate.

### d. Breach of confidentiality

- If a staff member or service user believes that the Confidentiality Policy has been breached, The Care Forum encourages them to use the appropriate Care Forum procedure, as set out below.
- If confidentiality is breached inadvertently, the staff member will follow procedures including record keeping, discussions with line manager/s and containment.
- Staff members should use the Grievance Procedure. Service users should use the Complaints Procedure. The Chairperson will address any breach of the policy by members of the Board of Trustees.
- Breaches of confidentiality by staff members may also be addressed through line management and supervision, and in serious or deliberate cases, the Disciplinary Procedure may be invoked.

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## e. Taking responsibility

- As part of their induction on joining The Care Forum, staff members will be required to read and understand the Confidentiality Policy. They will be expected to incorporate it into their practice and abide by terms specified. This will be clearly defined at interview, and reinforced through training and supervision.

## Equality Policy

The Care Forum is committed to eliminating discrimination amongst our workforce. Our objective is to create a working environment in which there is no unlawful discrimination and all decisions are based on merit.

We recognise the value of encouraging the recruitment and retention of a workforce which reflects our diverse customer base. We will endeavour to fill vacancies and skills gaps through recruiting from the widest possible talent pool, reflecting the diversity of our local community.

### Eligibility

This policy applies to all employees, contractors and job applicants.

### Understanding discrimination

Discrimination is unlawful when it takes place on one of the following grounds (the 'protected characteristics'):

- age
- disability
- gender re-assignment
- marriage and civil partnership
- pregnancy and maternity
- race
- religion or belief
- sex
- sexual orientation

### Discrimination can take a number of forms:

- Direct discrimination is when someone is treated worse than someone else just because of a protected characteristic. For example, it would be direct discrimination if a manager excludes an employee from a training course just because she is pregnant.
- It is also direct discrimination when someone is treated worse than someone else because they associate with someone with a protected characteristic or because they are perceived to have a protected characteristic. For example, it



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- would be direct discrimination if an employee ostracised a colleague because the colleague has a gay flatmate or because he thinks the colleague is gay.
  - Indirect discrimination is when an apparently neutral practice or requirement disproportionately disadvantages one group and cannot be justified by the needs of the business. For example, imposing a requirement that job applicants must speak fluent English disproportionately disadvantages non-English groups and would be unlawful unless it could be justified on genuine business grounds.
  - It is also discrimination when a disabled person is treated unfavourably because of something connected to their disability and this cannot be justified by the needs of the business or when the business fails to make reasonable adjustments for a disabled person.

## **Our responsibilities and approach to employees**

We aim to avoid discrimination in all aspects of employment and recruitment. Our approach to different aspects of employment and recruitment is set out below.

### **Recruitment and selection**

We aim to ensure that job requirements and job selection criteria are clear and based only what is required to get the job done effectively. We will avoid making stereotypical assumptions based on protected characteristics about who is able to do a particular job.

We aim to ensure that no job applicant is placed at a disadvantage by practices or requirements which disproportionately disadvantage protected groups and which are not justified by the demands of the job.

For all jobs, we will draw up a clear and accurate job description and person specification to ensure that we remain focussed on what the job involves and the skills, experience and qualifications which are relevant and necessary to do the job.

Shortlisting for interviews is applied fairly and consistently to all applicants. If we hold interviews, we will try to ensure that more than one person conducts them to ensure that we avoid unintentional bias.

We will not ask for personal or irrelevant information on application forms or in interviews. We will focus instead on whether someone has the relevant skills, qualities and experience to do the job.

### **Promotion, training and appraisals**

Promotion and training decisions will be made on the basis of merit. We will not unlawfully discriminate against any employee in making promotion or training decisions. We believe all employees should have an equal opportunity to progress and develop.

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We will advertise promotion and transfer opportunities widely, including deputising opportunities and secondments which could lead to permanent promotion. We will try to ensure that training and development opportunities are made known to all relevant employees

Training needs will normally be identified through regular reviews/training needs analysis/appraisal discussions.

We have a formal appraisal system which helps us to ensure that employees are being assessed fairly on the basis of job performance and are not being discriminated against. We will conduct appraisals objectively and measure performance in a transparent and objective way, without prejudice or bias.

### **Working conditions and terms of employment**

The Care Forum will try to accommodate cultural or religious practices such as prayer requirements where we reasonably can.

We aim to ensure that our terms of employment, benefits, facilities and policies are free from unlawful discrimination.

We will ensure that decisions made under our disciplinary, grievance, performance improvement and attendance management policies are carried out fairly and without discrimination.

We will open up as many jobs as possible to flexible working arrangements.

### **Termination of employment**

We will ensure that we avoid discrimination in making decisions about dismissal or redundancy.

### **Disabled employees**

We will make adjustments to accommodate disabled employees where possible and reasonable.

### **Training on equalities**

We will train our managers and those responsible for recruitment and also endeavour to ensure that all our employees are made aware of and understand how to work to avoiding discrimination.

### **Your rights and responsibilities**

You have the right not to experience unlawful discrimination in our workplace. You also have a responsibility to understand this policy and help us to implement it. All employees have a duty not to discriminate against each other and not to help anyone else do so.

### **Our relationships with visitors, customers and suppliers**

You must not discriminate against any of our visitors/customers/suppliers. Equally, we expect our visitors/customers/suppliers not to discriminate against you and we will take appropriate action against any visitor/customer/supplier found to have done so.

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## What to do if you have been discriminated against

If you believe you may have been discriminated against, please tell us. You can speak informally with your manager. If you want to make a more formal complaint, you are encouraged to raise the matter through our Grievance procedure. If you believe there has been any bullying or harassment then you should raise the matter through our Anti Bullying and Harassment Procedure.

Allegations of potential breaches of this policy will be treated seriously. Employees and contractors who make such allegations in good faith will not be victimised or treated less favourably as a result. However, false allegations of a breach of this policy which are found to have been made in bad faith will be dealt with under our disciplinary procedure.

## What will happen if you act in a discriminatory way?

If, after investigation, we decide that you have acted in breach of this policy you may be subject to disciplinary action up to and including dismissal. This applies to the most senior levels of management as well as to all other employees.

## Policy review and promotion

We will promote and publicise our Equality Policy as widely as possible using The Care Forum's websites, application packs, induction packs, notice boards, handbooks and annual reports.

# Volunteers Policy

## Philosophy

The Care Forum is indebted to volunteers for helping it to develop. Our Volunteers Policy follows the principals of The Volunteers Charter, especially through our underpinning philosophy which is:

- Volunteers provide a valuable resource for us through their skills, experience and individualism.
- Volunteering is a valid activity in its own right and we will not use volunteers as a substitute for paid workers.
- Volunteers are recognised as equal partners in achieving the aims of the organisation
- As part of our commitment to local communities and the development of a fairer society, we believe volunteers should have opportunities to develop and learn new skills, both as members of that society and contributors towards it.

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- As a significant feature of The Care Forum and the work that we do, we will match all volunteer's commitments and liabilities with adequate supervision and support to assist them in expanding and developing or changing their line of work.

## Who is a volunteer?

A volunteer is someone who does not receive financial compensation beyond the reimbursement of expenses and who performs a task at the request of, or on behalf of, The Care Forum – e.g. volunteer advocates. There is a separate policy relating specifically to volunteers who are Trustees of the organisation.

## Context

This policy is to be viewed and understood in relation to The Care Forum's Equalities and Diversity Policy (e.g. we will always adhere to this when recruiting or dealing with our volunteers), Conflict Of Interest Policy, Confidentiality Policy, (e.g. we will always prioritise confidential issues as appropriate on information held or known about volunteers), Health And Safety Policy, Whistleblowing and Lone Working Guidelines.

## Responsibilities of The Care Forum

The Care Forum will:

- Recruit volunteers through equal opportunities selection and recruitment criteria. As part of this we will take up references for new volunteers and undertake Disclosure Check via the Disclosure and Barring Service as appropriate to the tasks they are to undertake.
- Cover volunteers under our insurance policy in respect of public liability and personal accident. This does not include volunteers travelling to and from anywhere to do with their placement at The Care Forum.
- Train all volunteers to undertake their role within The Care Forum.
- Pay expenses to volunteers during their training or any aspect of their work, for example, travel expenses, child care and phone calls. Child care expenses are liable for income tax and national insurance contributions.
- As far as foreseeable, provide a safe working environment for volunteers whether inside or outside the office.
- Clearly define the work, tasks, roles and responsibilities of any volunteer and pre-placement or on-the-role training where appropriate.
- Consult volunteers on changes which directly affect them prior to action
- Put no pressure on volunteers as to the number of set hours they work
- Supervise volunteers carefully, either through one-to-one means or in regular groups, as appropriate.
- Provide a written reference to any volunteer wishing to move on from The Care Forum, in support of their development.
- Not put any volunteer under moral pressure to undertake work, which are against their principles.
- Ensure volunteers are accountable for their work.
- Circulate a copy of The Volunteers Charter to all volunteers.

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- Aim to provide supported volunteering to volunteers with additional support needs. However if this is not possible (due to restrictions in our resources) we will signpost individuals to an organisation that has suitable resources committed to supporting volunteers with additional support needs.

## Rights of Volunteers

### Volunteers for The Care Forum have the right to:

- Refuse or withdraw from tasks, which they either do not wish to undertake, or feel they have not had adequate support in.
- Have their views and feedback about their experience of volunteering with The Care Forum considered by the board of trustees if required.
- Have open access to any file that is relevant to them
- Join a trade union or professional association relevant to their work
- Be told how and under what circumstances The Care Forum will end their volunteering role and how they can challenge this if they feel it is necessary.
- Be consulted on any changes that will affect them.
- To use the grievance and complaints procedure.

### Rights of The Care Forum

- To dismiss a volunteer in accordance with The Care Forum's policies.
- To make decisions about service delivery and use of volunteers, after appropriate consultation has taken place.
- To hold information about volunteers that we may be legally required to produce by the Inland Revenue or Department of Work and Pensions – or other statutory bodies
- To hold copyright for any document or piece of work designed by a volunteer for The Care Forum.

### Hopes and expectations of volunteers

- To provide receipts for expenses claimed wherever possible.
- To be familiar with the policies and procedures of The Care Forum and its services and to operate within them.
- To take responsibility for their own health and safety and have regard for that of others while volunteering for The Care Forum.
- To communicate their wants and interests clearly.
- To be reliable as far as possible and to inform staff of any commitments they will be unable to keep.
- To operate within the equalities and diversity policy.
- To adhere strictly to the confidentiality, health and safety and staff conduct policies
- To be clear about their role and to whom they are responsible.
- To participate in support and supervision meetings and work within accountability structures.
- To volunteer for The Care Forum for a mutually agreed period of time.
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## Recruitment of Volunteers

- A role description should be defined, outlining responsibilities, terms of engagement and skills required
- A clear management structure for recruiting and supporting the role should be agreed
- The role should be advertised in an inclusive way
- All applications should be received on the formal application form used by the organisation in the same way that paid roles are processed.
- Successful volunteers will need to provide a reference and depending on the role recruited for, be subject to a CRB check prior to starting to volunteer.

## Ongoing support and supervision

- Once recruited, all volunteers will receive a planned induction to include training and orientation into
- The organisation's vision, aims and objectives, and strategic plan
- Their role and responsibilities
- Standards of tasks, attendance and conduct expected of them
- The Policy Handbook, containing all the policies and procedures of the organisation
- Following their induction, a designated member of staff will continue to support and carry out regular supervision sessions, monitoring their work and allocating new tasks.
- Volunteers who are Trustees of the organisation will not be managed by staff, but will work closely with the Chair of Trustees.

## Volunteer Expenses Policy

It is The Care Forum's aim that volunteers are not 'out of pocket' by volunteering with TCF and that in ensuring this; we stress the value and respect we place on volunteers and their contribution to the service of TCF. All reasonable expenses for travel, childcare, postage, telephone and access requirements (such as accessible transport and personal assistants) will be paid as far as budget restrictions allow.

If a volunteer is claiming state benefits they must inform their benefits office that they are undertaking voluntary work. TCF is under no duty to inform the benefits office on behalf of a volunteer. The reimbursement of expenses incurred during voluntary work should not affect any benefit entitlement.



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If a volunteer is seeking employment and claiming job seekers allowance, they must inform the job centre that they are undertaking voluntary work. In this instance, a volunteer must be seen to still be available to seek jobs, attend interviews and take on work as agreed with their personal advisor at the job centre. There are various conditions that may affect a volunteer's job seekers allowance. Volunteers can seek support and further information from their line manager at TCF and their personal advisor at the job centre.

## Receipts

Please remember that if a receipt is available to you then we need it.

## Travel

- **Own Car**

Mileage is paid per mile by each respective Healthwatch group that you are signed up with as a volunteer – mileage is paid at a set rate per mile (see page 30). Mileage and/or public transport fares will be covered within the area(s) of the specific volunteering project (this could cover Bath & NE Somerset, Swindon or Wiltshire). The allowable travel expenses for each project will be specified prior to volunteer recruitment.

Public transport fares (but not car mileage) are paid for journeys undertaken outside the agreed area(s) of the specific volunteering project. It is the volunteer's responsibility to keep an accurate record of their mileage or to keep receipts for public transport fares when undertaking voluntary work for a BSW Healthwatch group.

Volunteers using their own car must have told their insurance company that they intend to use their car in a voluntary capacity and include the 'occasional business use' clause in their policy. Premiums should not be increased if the company is informed that the volunteer's driving is not for profit and that only expenses will be paid. Volunteers should include and maintain in their policy of insurance a clause indemnifying Healthwatch BSW against all third party claims, including those concerning passengers. The present mileage allowance paid by Healthwatch BSW for authorised travel in a private vehicle has been set to include any charge for the clause 'occasional business use' insurance cover.

- **Public transport**

2<sup>nd</sup> class travel rates are paid to volunteers, who should take advantage of any cheap fares where possible. Volunteers must submit tickets with their claims.

- **Taxis**

The use of taxis will be authorised when the volunteer has specific access requirements and is disabled, temporarily or permanently, in a way that makes public transport difficult to use. Volunteers may also use taxis in the following circumstances:

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- 1) When travelling late at night.
  - 2) In situations where no public transport is available.
  - 3) When several people are travelling together and the cost would be cheaper than using other reasonable means of transport.
  - 4) When volunteers need to carry heavy or bulky items.

Volunteers should check with the Project Co-ordinator beforehand for clarification. Volunteers must submit a receipt with their claim.

- **Bicycle**

If a volunteer uses a bicycle on Healthwatch BSW business, an agreed rate is payable.

- **Travel outside the designated area**

All journeys outside of the area in which volunteers are carrying out their roles must first be authorised by the Project Co-ordinator concerned.

## **Access requirements**

Healthwatch BSW will meet access costs, which enable Volunteers to participate in Healthwatch BSW business and advocacy work. These include:

- **Personal assistance**

Reasonable costs for Volunteers needing personal assistants whilst on Healthwatch BSW business will be reimbursed on provision of a receipt.

- **Carers**

Volunteers with caring responsibilities will be reimbursed when an alternative carer needs to be used to cover their time whilst on Healthwatch BSW business. This will be on provision of a receipt.

- **Childcare**

Reasonable rates for childcare required whilst on Healthwatch BSW business will be reimbursed on provision of a receipt. Volunteers need to sign a childcare expenses form to state that the childcare had no educational benefit for the child (for instance, Healthwatch BSW could not reimburse the cost of a piano lesson).

All rates for any of access requirements will be paid at a rate agreed with the relevant Project Co-ordinator beforehand and should be recorded on the 'Access' section of the expenses claim form with receipts attached for authorisation.

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## Use of Telephone/ E-mails

At times volunteers may have to use their own telephone to make calls and send or receive E-mails related to Healthwatch BSW work. Healthwatch BSW will reimburse the cost of calls dependent on whether the call has been made from a landline or a mobile phone. This rate includes reimbursement for any minimum connection charge to the service provider.

The use of mobile phones is sometimes necessary to contact complainants; Volunteers must ensure that they only use a mobile phone to landline or landline to mobile phone when no other option is available.

Please note we pay a fixed rate for all mobile phone calls of 0.35 a minute and no special rate for calling numbers such as 0800 or 0845 from mobile phones. Text messages are also paid at 0.05p each.

## Administration costs

- Postage

Volunteers should use 2<sup>nd</sup> class postage as much as possible. Healthwatch BSW will provide volunteers with a book of second class stamps. Volunteers should ensure they maintain a supply of pre-paid envelopes in which to send correspondence to the respective Healthwatch BSW office.

- Photocopying

Volunteers are requested to use their respective Healthwatch BSW office for photocopying as much as possible (as there is no office for Healthwatch BaNES, the Healthwatch BaNES Volunteer Support Officer will find an appropriate suggestion if photocopying becomes necessary). If volunteers need to use alternative photocopying facilities, costs will be reimbursed on provision of an expenses form and receipts.

- Stationery

Healthwatch BSW may provide headed notepaper and other items of stationery for volunteer use. All administration costs incurred must be submitted in the 'Post and Stationery' section of the claim form with receipts.

## Subsistence Allowance

An allowance will be paid for meals taken away from home or an Healthwatch office base when Volunteers are on Healthwatch BSW business, for a period of 4 or more consecutive hours. The maximum reimbursement will be dependent on the time of day and mealtime covered. A completed 'Subsistence' section on the expenses claim form must be submitted with details and receipts attached. Money can only be reimbursed for receipted refreshments. The subsistence allowance must first be authorised by the project coordinator.

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## Training participation

You may be asked to take part in training events Healthwatch BSW projects are involved in. Expenses incurred during your involvement will be discussed prior to the event with yourself and the volunteer support officer and reimbursement made accordingly.

## Submission of claims

Systems are in place to ensure efficient and speedy payment. Claims need to be submitted to the relevant Volunteer Support Officer for authorisation. These are then passed to The Care Forum's Finance Administrator. The TCF Treasurer and another named signatory sign cheques. Cheques will normally reach you between 2 – 4 weeks later.

The Volunteer Expenses Claim Form has sections for telephone, travel, access, subsistence and stationery. The form should be submitted monthly (unless there are exceptional circumstances), within two weeks of the last date covered and need to be authorised by a Volunteer Support Officer.

On occasion, payments can be raised through petty cash if a payment is urgent or if cash is needed in advance for a larger purchase. Please negotiate this with the relevant Volunteer Support Officer if this is necessary.

You need to let us know when you start to volunteer with us if you would like to be paid by cheque or direct into your bank account via a BACCS system. The latter is the easier option for us, but the decision is up to you. Finance do two payment runs a month, mid month and late month. You need to get payment in by the first week of the following month in each case if you want to avoid waiting too long for reimbursement.

If you e mail your expenses to us we will send you an e mail confirmation when you have been paid.

Claim forms can be obtained from the volunteer development coordinator.

## Reimbursement of Expenses

Car mileage	0.45p per mile
Bicycle allowance	0.20p per mile
Telephone landline	0.04p per minute
Mobile telephone	0.35p per minute
0800/0845 Numbers	0.35p per minute

Texts 0.05p each

Agreed by the Executive Committee

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## Problem Solving Procedure

### Introduction

Healthwatch BSW are indebted to volunteers for helping them to develop. The aim of this procedure is to ensure that any problems that might arise during a volunteer's time volunteering at any of the three Healthwatch groups are dealt with in a fair and consistent way.

We have a collaborative approach to problem solving and we aim to work closely with volunteers if problems arise. Most problems are best dealt with informally in discussion with the Volunteer Support Officer. Notes should be kept of the meeting and if this does not resolve the problem, then it will need to be addressed through a structured procedure.

### If a volunteer wishes to make a complaint

#### Procedure

This part of the problem solving procedure gives the volunteer the right to complain if they have been unfairly treated.

#### Stage 1 – Oral Complaint

A volunteer, who has a complaint whether against a member of staff, the organisation or another volunteer, should discuss this with the Volunteer Support Officer. If the complaint is about the Volunteer Support Officer, then the matter should be referred to a general manager, who will then process the complaint. During this meeting the volunteer can be accompanied by a nominated person of their choice. If the issue cannot be resolved at this stage then the volunteer should proceed to stage 2.

#### Stage 2 – In Writing

If the volunteer is not satisfied with the outcome of the oral complaint, they should make a formal complaint in writing to the Volunteer Support Officer. If the complaint is about the Volunteer Support Officer, this should be addressed to a general manager. They have 10 working days to do this.

The Volunteer Support Officer will then invite the volunteer to attend a meeting within a working week of the complaint being received. During this meeting the volunteer has the right to be accompanied. This meeting should cover the details in the complaint and what outcome the volunteer would like. The Volunteer Support Officer/general manager may suspend the meeting if they feel they need to take advice or undertake further investigation.

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Within two working days of the meeting the Volunteer Support Officer must inform (in writing) the volunteer of the decision and response to the complaint. The Volunteer Support Officer should inform the volunteer of their right to appeal if they are not happy with the decision made.

### **Stage 3 – Opportunity to appeal**

If the volunteer is not satisfied with the outcome, then they should inform the volunteer coordinator within ten working days. Within one working week the appeal will be formally referred to the chief executive move forward with the complaint.

The volunteer will be invited to a meeting and they can have a nominated person present at this meeting. During this meeting the volunteer must cover the reasons as to why they want to appeal against the previous decision, the outcome they would like and any new evidence that has come to light.

The chief executive will give a decision in writing as soon as possible, but in any event no later than ten working days from the date of the appeal meeting.

### **If someone complains about a volunteer**

#### **Procedure**

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

#### **Stage 1 – Oral Discussion**

A volunteer, who has had a complaint made against them, will be given the opportunity to discuss the complaint with the volunteer coordinator. This discussion should cover the details of the complaint and identify any options on how the complaint may be resolved. Goals will be identified to help the volunteer fulfil their role and any extra support, supervision or training the volunteer requires will be identified. An agreed deadline will be set for reviewing the situation.

If resolved a letter will be written to the complainant confirming how the complaint was resolved.

#### **Stage 2 – Written Warning**

If the complaint has not been resolved by an oral discussion, then the volunteer coordinator can issue the volunteer with a written warning outlining the reason for the complaint.

The volunteer will be given the opportunity to attend a meeting to state their case. During this meeting the volunteer has the right to be accompanied. The meeting should cover the details of the complaint, identify further goals and where necessary offer further support.



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However, if no resolution can be achieved or the volunteer is unable to carry out their role set in the role description (after the respective Healthwatch group has identified what support or adaptations could be provided to help the volunteer carry out the role) they would be asked to leave the organisation. The volunteer will be informed of their right to appeal if they are not happy with the decision made. The volunteer will have ten working days to appeal the decision.

The decision to dismiss a volunteer is a very serious step and one which is carefully considered by Healthwatch BSW and The Care Forum and seen as a last resort.

### **Stage 3 – Opportunity to appeal**

If the volunteer is not satisfied with being asked to leave, then they should appeal in writing to the volunteer coordinator within ten working days. Within one working week the matter will be formally referred to the management committee in order to move forward with the appeal.

The volunteer will be invited to a meeting where they can have a nominated person present. During this meeting the volunteer must cover the reasons as to why they want to appeal against the previous decision, the outcome they would like and any new evidence that has come to light.

The chief executive will give a decision in writing as soon as possible, but in any event no later than ten working days from the date of the appeal meeting. The management committee's decision is final.

### **Exceptions**

On some occasions volunteers can be suspended immediately while an investigation is carried out. These include but are not limited to acts that constitute gross misconduct, e.g. theft, assault, act of violence, malicious damage, deliberate falsification of documents, harassment or being under the influence of drugs or alcohol. The decision to suspend a volunteer will be confirmed to the volunteer in writing.

## **E Learning**

Healthwatch England have produced an Introduction to Healthwatch e learning programme that can be accessed through the link below.

### **Healthwatch induction**

<https://network.healthwatch.co.uk/e-learning/2019-05-29/healthwatch-induction-e-learning>

### **An introduction to Equality, Diversity, Equity and Inclusion**

<https://network.healthwatch.co.uk/e-learning/2024-08-08/introduction-equality-diversity-equity-and-inclusion>

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## What can you expect from us

People volunteer for different reasons; whether it is to meet people, give something back, to help create change or to gain experience and enhance your CV. We will do our best to help you achieve your reasons for volunteering.

One thing that is certain is that you will be fully trained and supported in whatever role you choose. You will have the opportunity to attend other training events both in-house and external and if you choose, attend various Healthwatch events.

You will:

- Have a detailed outline of your role within Healthwatch
- Receive dedicated training associated with your role
- The opportunity to attend external training (some accredited)
- Receive information on other events/meetings you may wish to attend
- Have a dedicated line to your Volunteer Support Officer
- Receive supervision and reviews
- Be reimbursed for any expenses you incur
- Receive monthly updates
- Attend quarterly Volunteer Connect Meeting, with tea and cake
- Be recognised and appreciated for the support you give us
- Have the access to a reference after three months of volunteering



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## What we ask of you

Our community of people who give their time to support us are incredibly valuable, we offer volunteering roles that clearly set out what is expected of you and what they in turn you can expect from us. We want to keep things simple and so we ask that you:

- Read and agree to our policies and procedures
- Read and agree to our code of conduct
- Agree to a DBS if required within your role
- Attend training both internally and externally
- Act as a professional representative to Healthwatch
- Communicate with your Volunteer Support Officer if you have any concerns within your role
- Communicate with your Volunteer Support Officer if you cannot attend a meeting/event or other part of your role
- Be an active member of the volunteer team
- Enjoy your time with us and give us feedback to be better



