



## **POLICY DOCUMENT**

**Group Member:** Progress Housing Group

**Service Area:** Progress Involvement Team

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**Subject Title:** Customer Volunteering Policy

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**Document Owner:** Head of Operations – Homes and Opportunities

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## 1. INTRODUCTION

- 1.1 Progress Housing Group (the Group) is committed to ensuring that customers are at the heart of the business through an effective and meaningful engagement structure. This includes customers giving up their time to carry out roles in a voluntary capacity to support the work of the Group.
- 1.2 This policy refers to customers rather than tenants as it is inclusive of people who receive services, but are not exclusively tenants, for example leaseholders and shared owners.
- 1.3 This policy sets out the details of our volunteering offer to all customers who undertake a volunteering role within the Group.

## 2. SCOPE OF POLICY

- 2.1 This policy covers customers (excluding customers of Key Unlocking Futures Limited, Progress Lifeline and Progress Living), who volunteer to carry out or attend activities which are arranged or facilitated by the Group.
- 2.2 The policy relates to volunteering activities undertaken by adults. It does not cover any activities carried out by people under the age of 18.
- 2.3 This policy supports the delivery of the Customer Voice Strategy.

## 3. RESPONSIBILITY

- 3.1 The Customer Voice Manager is responsible for the monitoring and review of this policy.
- 3.2 The Customer Voice Manager is responsible for ensuring that a health and safety risk assessment is undertaken for activities carried out by volunteers and ensuring suitable control measures are in place to reduce risks.
- 3.3 Where in receipt of income, volunteers are responsible for notifying the relevant person of any volunteering roles they carry out, where it is relevant or a requirement.
- 3.4 The Customer Voice Team is responsible for implementing this policy.

## 4. POLICY

### 4.1 Aims and Objectives

- 4.1.1 The aims of this policy are;
  - to support and promote volunteering opportunities to

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customers across the Group;

- to set what volunteers can expect from the Group;
- to set what the Group expects from volunteers.

### **What is Volunteering?**

- 4.1.2 Volunteers are customers who freely choose to contribute their time, energy and skills to support the Group to develop and deliver services to meet customers' needs.
- 4.1.3 It can include attending meetings, carrying out community checks, providing feedback on calls and live chat experience (Talkback) and supporting community events or activities.
- 4.1.4 Our volunteers are unpaid. However, they can expect reimbursement for reasonable out of pocket expenses.
- 4.1.5 The Group is committed to ensuring that volunteers receive the best possible experience whilst volunteering with us to ensure they feel fulfilled and valued.

### **What volunteers can expect from the Group**

- 4.1.6 To ensure our volunteers feel confident and valued and enjoy their role, the Group is committed to the following;
- Treating all volunteers with respect, consideration and appreciation
  - Ensuring volunteers have a clear understanding of their responsibilities, by providing a role description for volunteering activities
  - Provide information about training and support available to help volunteers carry out their role successfully
  - Update volunteers on how their work has made a difference
  - Provide any equipment required to carry out the role and make any reasonable adjustments to allow for equal opportunities
  - Ensuring that any Health and Safety risks are identified and any relevant measures are put in place to reduce the risks
  - Reimburse any reasonable out of pocket expenses incurred whilst carrying out the role
  - Recognise the work carried out by volunteers to support the Group and their customers
  - Provide volunteers with opportunities to;
    - develop new skills for personal development or to support future job applications
    - develop experiences for personal development

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- support the Group in improving services provided to customers
- support local communities.

#### **What the Group expect from volunteers**

4.1.7 The Group is committed to providing good quality services and requires high standards of behaviour from all our employees and volunteers. We would therefore ask volunteers to;

- Treat all Group employees, contractors, customers and members of the community with respect, consideration and appreciation
- Follow the Group's Code of Conduct Policy, a copy of this is provided to volunteers as part of induction
- Act professionally when carrying out their volunteering role
- Sign a relevant service level agreement to show they understand the nature and responsibility of the individual role
- Complete a DBS check, if required, when undertaking volunteer roles within the community (this does not include attending Group or Forum meetings), the cost of which will be met by the Group
- Not to promote themselves as an employee or official representative of the Group
- Wear the appropriate identification badge showing their name, photograph and role as a volunteer
- Adopt the Groups approach to Equality, Diversity and Inclusion to prevent discrimination
- Provide as much notice as possible if they cannot fulfil their volunteering commitment, or if they no longer wish to carry out a volunteering role
- Ask for advice or support if they are unclear as to what is expected from their volunteering role
- Treat any equipment provided by the Group with respect and return the items in the same condition as they were provided. Any damaged or lost items could be recharged to the volunteer by the Group
- Follow the Group's Health and Safety Policy and adhere to all risk assessments related to carrying out the role.

#### **Recruitment**

4.1.8 The Group is committed to providing volunteering opportunities to all our customers. Consequently there is no formal application process in place. However, some volunteering roles will have a specific role description and expectations of the role. These will be discussed and agreed with each volunteer individually.

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4.1.9 To encourage new volunteers, the Group will consider linking volunteering opportunities to the Tempo Time Credit project. Tempo Time Credit is a national project which rewards volunteers with a time credit per hour of volunteering time. Credits can be spent locally and national i.e. at local leisure centre or Madame Tussauds.

### **Training**

- 4.1.10 The Group is keen to ensure that all volunteers receive appropriate training to carry out their role competently.
- 4.1.11 All training provided will be free of charge to volunteers.
- 4.1.12 An annual training plan will be developed and shared with volunteers.
- 4.1.13 Details of training opportunities, including external events, will be shared with all volunteers.
- 4.1.14 Volunteers must pre-book their place on any training events as places may be limited.
- 4.1.15 As places for external training courses and conferences are restricted, if the event is oversubscribed places will be allocated on the following basis;
- Specific skills of customers which would provide added value to the Group
  - Customers who have not previously attended external training or conferences
  - Names will be drawn randomly
- 4.1.16 If a volunteer is booked to attend an external course or conference and needs to cancel, they must inform the Customer Voice Team as soon as possible to enable the place to be offered to another volunteer.
- 4.1.17 Volunteers attending external training and conferences will be asked to provide all training and information material to the Customer Voice Team so it can be shared with others.
- 4.1.18 Volunteers attending external training and conferences will be asked to provide an overview of the event to share their experience with other volunteers either by written or verbal update.

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### **Leaving a Volunteer role**

- 4.1.19 The Group recognises that volunteers may decide that they no longer wish to carry out their volunteer roles. Volunteers can leave at any time, but we would ask that volunteers confirm that they no longer want to be involved. This will enable us to update our records appropriately and ensure unwanted contact is not made with customers.
- 4.1.20 On leaving the volunteer role, all equipment and identification provided by the Group should be returned in a good and clean condition.
- 4.1.21 In some cases, it may be necessary for the Group to bring a customer's volunteering role to an end. This may be where there has been a breach of this policy, a serious breach of their tenancy agreement or lease or a safeguarding issue.
- 4.1.22 Should this be the case, a member of the Customer Voice Team will contact the volunteer to discuss the matter and inform them as to what action will be taken. The discussion will include how the volunteer may again be involved in volunteering activities in the future, once the issue has been resolved. The outcome of the discussion will be provided to the volunteer in writing.

### **Expenses**

- 4.1.23 The Group is keen to ensure that customers are not financially worse off by carrying out their volunteering role. We therefore ensure that all reasonable out of pocket expenses are reimbursed to our volunteers.
- 4.1.24 Expenses that can be claimed to support volunteering role include;
- Travel expenses
    - A mileage rate is set in line with His Majesty's Revenue and Customs (HMRC) approved mileage rate.
    - Reimbursement for use of public transport
    - Where no alternative transport is appropriate, reimbursement of taxi fare will be considered
    - To ensure value for money and support the Groups commitment to the environment volunteers are asked to share travel arrangements whenever possible
  - Parking charges for the duration of the event or activity
  - Subsistence

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- For volunteers attending an all-day event, conference or training event, where refreshments are not included, volunteers may submit a claim to recover the cost in line with the Groups subsistence allowances.
  - Under no circumstances can alcohol be claimed for.
  - Translation, signing services, or other agreed reasonable adjustments that incur a cost
  - Childcare and Carer Costs
  - Digital connection
- 4.1.25 Evidence of all expenses must be provided to the Customer Voice Team before reimbursement is provided. This will include;
- Mileage claim form
  - Expenses claim form
  - Receipt
- 4.1.26 The Customer Voice Team will process all reimbursement claims.
- 4.1.27 All claims must be submitted within three months of the expense being incurred.
- 4.1.28 To ensure reimbursement is processed efficiently volunteers are requested to provide bank account details, including proof of the account i.e. paying-in slip.
- 4.1.29 Reimbursement payment will be made directly to bank account provided.

### **Community Associations**

- 4.1.30 The Group is committed to support formal, constituted community associations. An annual grant is provided to community associations (£1 per Group owned property in the areas the community association operates, up to a maximum of £200).
- 4.1.31 A condition of the grant is that community associations must have their accounts audited every year and a copy of the audited accounts provided to the Customer Voice Team.
- 4.1.32 No other expenses may be claimed by community associations for their activities.

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### **Health and Safety**

- 4.1.33 The Group is committed to ensuring the health, safety and wellbeing of everyone who works for us, use our premises or receives services we provide. This includes our team of volunteers.
- 4.1.34 It is therefore important that volunteers understand and accept their personal responsibility towards promoting and maintaining health and safety standards.
- 4.1.35 Volunteers will receive health and safety training that may be required in relation to specific tasks they undertake.
- 4.1.36 The Group will also provide any specific personal safety equipment required for carrying out specific tasks and provide training and instruction in their use.

### **Insurance**

- 4.1.37 Volunteers carrying out business related activities for the Group are covered by the Group's Employers Liability Insurance and Public Liability Insurance.
- 4.1.38 Volunteers will be required to have appropriate insurance cover for any vehicles they are using for carrying out their duties. Volunteers are also advised to notify their insurance provider that they use their vehicle for this purpose.

### **Confidentiality**

- 4.1.39 Whilst carrying out their role volunteers may receive information that is of a sensitive and confidential nature. This is covered in more detail in the Code of Conduct Policy, which all volunteers must follow.

### **Data Protection**

- 4.1.40 The handling of any personal data will be dealt with under the Group's Data Protection Policy which ensures compliance with the Data Protection Act 2018 and the General Data Protection Regulations.

### **Identity cards**

- 4.1.41 The Group will provide all volunteers with appropriate identity cards. Identity cards must be worn by volunteers when undertaking their volunteering roles.



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## 5. CONSULTATION

- 5.1 This policy was consulted with involved tenants in June 2023 to ensure it includes everything they feel is important.
- 5.2 During the consultation tenants felt it was appropriate to combine the Customer Volunteering Policy, Community Involvement Expenses Policy and Community Involvement Training Policy. This recommendation has been actioned as part of the policy review to provide a comprehensive policy for volunteers.
- 5.3 The Operational Leadership Team has been included within the consultation process.

## 6. REVIEW

- 6.1 This policy will be reviewed every three years, unless there are changes that require an earlier review.

## 7. EQUALITY IMPACT ASSESSMENT

- 7.1 An Equality Impact Assessment has been produced for all community engagement activities, including volunteering roles.