

1. Introduction

This policy sets out the principles and framework for voluntary involvement in The Elizabeth Foundation (TEF). It applies to everyone connected with TEF, including volunteers, staff, trustees, ambassadors, and people holding elected or appointed roles.

This policy is formally endorsed by the Board of Trustees and will be reviewed at least once every year to ensure it remains aligned with TEF's needs, relevant legislation, and best practice in volunteer management.

2. Commitment

TEF recognises that volunteers make a vital contribution, bringing skills, time, energy and fresh perspectives. We believe volunteering benefits service users, staff, communities and the volunteers themselves.

We are committed to involving volunteers in roles that are meaningful, supported, and appropriate, and to managing our volunteering programme in a way that values their contribution, treats volunteers fairly, and safeguards everyone involved.

We accept our responsibility to manage volunteer engagement in a structured and sensitive way so that volunteer time is used well for mutual benefit.

3. Aim

The aim of this policy is to provide coherence and consistency across TEF's various volunteer-related policies and procedures (e.g. recruitment, expenses, training, health & safety, safeguarding). It clarifies the role of volunteers and sets out how they can expect to be treated.

Everyone has the right to volunteer and to have a positive, rewarding volunteer experience, subject to legal requirements (satisfactory DBS checks, age restrictions, appropriate references) and suitability for the role.

4. Definition

Volunteering is a non-contractual, freely chosen activity whereby individuals give their time, energy and skills to benefit others or contribute to a cause, without expectation of payment (beyond reimbursement of agreed and vouched-for expenses).

Volunteers are not staff, they do not get paid and do not have an employment contract. TEF may provide a volunteer agreement (see below) but this does not create employment rights.

5. Statement of Values and Principles

Complementary, not substitutive

Volunteers complement but cannot replace paid staff. TEF will make clear the boundary between volunteer roles and those of paid employees

Respect, trust and mutual benefit

Volunteering is a “gift relationship” built on trust and mutual respect. While TEF can express expectations, it cannot impose enforceable obligations such as fixed hours or minimum service periods (unless required by law) but does have the right to terminate a volunteer relationship if the availability or skills of the individual no longer meets the needs of the charity.

Flexibility and choice

Volunteers are free to decline particular tasks, reduce hours, or terminate their involvement without penalty. TEF is under no obligation to provide continuous tasks or benefits beyond agreed support and reimbursement.

Inclusivity and non-discrimination

Volunteering opportunities must be open to everyone (subject to role-specific restrictions), regardless of age, gender, ethnicity, religion, sexual orientation, disability, or background, so long as they do not pose unacceptable risk to vulnerable groups. TEF will make reasonable adjustments to roles as needed to facilitate inclusive participation.

Transparency

Roles should be clearly described, with expectations and boundaries made explicit so that volunteers make informed decisions about whether and how to engage.

Quality, safety and accountability

TEF will ensure volunteers are supported, supervised, trained, and safe in their roles; and that the organisation is accountable to volunteers, beneficiaries, staff and wider stakeholders.

6. Volunteer Co-ordination

Each volunteer will be assigned a named staff (or experienced volunteer) supervisor/mentor, who is their first point of contact for guidance, queries, feedback or concerns.

TEF’s senior lead responsibility for volunteering is shared among:

- Karen Paine BEM, Deputy CEO (admin, marketing, fundraising)
- Julie Hughes, CEO (nursery and outreach services)
- John Atherton, Finance Director (finance, reception)

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These individuals are responsible for overall volunteer strategy, welfare, and oversight. However, all staff are expected to support, supervise and encourage volunteers where appropriate.

Volunteers will be informed, at induction of their supervisor's name, contact details, and how to request support or raise issues.

7. Recruitment and Selection

TEF follows an equal opportunity approach to recruitment and selection: volunteering should be open to all, subject only to role-appropriate restrictions (e.g. safeguarding, age, availability, capability and experience). Information not relevant to role performance will not be used in selection.

Role suitability is the sole criterion for acceptance; existing volunteers who are unsuitable for a certain role should be offered alternate options where feasible.

Prospective volunteers will complete an application form (or submit CV), provide two references (not from family/household), and participate in a (typically informal) interview or discussion of expectations and suitability with the Senior Manager / delegated supervisor.

TEF will apply "safer recruitment" standards at all times: as the charity's work brings staff and volunteers into daily contact with vulnerable groups (children or adults at risk), TEF will require an appropriate DBS (or equivalent) check, in line with Charity Commission, DBS and safeguarding guidance.

For identity verification, TEF will request at least two forms of up to date identification (e.g. one with photo, one proving current address) to verify identity.

To help ensure the safety of beneficiaries, guests and volunteers, all volunteers will have their photograph taken / be asked to submit an appropriate photograph, to be included on the staff and volunteer board in reception alongside their name. They may also be required to wear a volunteer badge whilst at TEF or attending events as a volunteer. Photographs are generally added to "Our Team" on the TEF website and on the TEF social media, unless the volunteer has expressly stated they do not wish to be included on the website/social media.

In selecting applicants, TEF will not consider unspent criminal convictions unless directly relevant to the role (and consistent with legal restrictions). Where a DBS discloses relevant information, TEF will follow its Adverse DBS / Disqualification policy, assess risk, and take a balanced approach.

Where a volunteer is not accepted for a role, TEF will provide feedback, where practicable, and suggest alternative roles or referral to other volunteering hubs (e.g. local volunteer centres).

8. Training and Development

Volunteers will, at induction, be given access to and awareness of relevant TEF policies (volunteering policy, safeguarding, health & safety, equality & diversity, confidentiality/data protection, complaints, etc). All volunteers will be asked to confirm that they have read, understood and will implement policies including safeguarding and Ethical Fundraising at the request of the Senior Management Team/delegated supervisor.

TEF commits to providing training/mentoring, support, and ongoing development opportunities to equip volunteers to perform their roles safely and effectively, and to foster personal growth. This aligns with the expectations in the Fundraising Regulator's Code 2025 regarding volunteer training for fundraising roles.

The designated leads (Julie Hughes, Karen Paine BEM, John Atherton) will ensure needed training is delivered, monitored, and updated.

Where appropriate, external training opportunities may be offered or encouraged, and costs supported by TEF (if agreed in advance).

9. Support, Supervision and Recognition

Each volunteer has a named supervisor or mentor to whom they can raise issues, ask for feedback, and receive support.

Regular support and supervision sessions (formal or informal) should be arranged by agreement between volunteer and supervisor to review progress, discuss challenges or training needs, and recognise contributions.

Volunteers will be given clear guidance, tools, and supervision for each task they undertake. Wherever possible, volunteers will be invited to provide feedback, ideas, or help shape future volunteer roles and activities (e.g. via inclusion in relevant team meetings or minutes).

TEF will aim to recognise volunteer contributions through formal and informal actions (thank-you letters, awards, volunteer appreciation events, mentions in newsletters, etc.).

10. Rights and Responsibilities

Volunteers' Rights - Volunteers can expect:

-  A clear role description (what they are and aren't expected to do) either verbally or in writing
-  Adequate support, training and supervision
-  To be treated with respect and fairness
-  Reimbursement of reasonable, agreed, and vouched out-of-pocket expenses
-  Insurance cover for their volunteer activities (TEF's liability policies cover volunteers, unless otherwise stated)

- ♥ A safe and healthy environment, with risk assessments in place
- ♥ Clarity about confidentiality and data protection obligations
- ♥ A process to raise concerns, complaints or grievances
- ♥ Freedom from discrimination, harassment or victimisation
- ♥ Opportunities for personal development and feedback

Volunteers' Responsibilities - Volunteers are expected to:

- ♥ Act reliably and responsibly
- ♥ Be honest, and adhere to TEF's values and ethics
- ♥ Maintain confidentiality (especially of personal data) and follow TEF's policies
- ♥ Undertake tasks only within the agreed scope and guidance
- ♥ Seek guidance if unsure about something
- ♥ Represent TEF positively and not bring it into disrepute
- ♥ Comply with TEF's relevant policies (safeguarding, fundraising, health & safety, equality & diversity, etc.)
- ♥ Engage in training and feedback processes
- ♥ Inform TEF in advance if unable to attend on agreed occasions

11. Expenses

TEF recognises that reimbursing expenses is important for equity: volunteers should not bear a financial burden through volunteering.

Volunteers may claim reasonable out-of-pocket expenses (e.g. travel, postage, phone, materials), subject to the submission of receipts or voucher and by completing a timely expense claim form. The policy on what is reclaimable and how will be explained before a volunteer begins tasks.

TEF's expense reimbursement approach will be consistent with staff policy and aligned with HMRC rules to avoid volunteers being construed as employees by virtue of payments. (E.g. reimburse on a "costs-only" basis)

Volunteers must submit claims promptly (within a defined period, e.g. 1 month) and retain supporting evidence. TEF's Finance Officer, Adam Hall will process authorised claims in a timely manner.

Where volunteers use their own vehicle for TEF business, they must ensure they have appropriate insurance (including volunteer driver cover) and comply with legal vehicle requirements (MOT, tax, insurance). TEF may set a per-mile reimbursement rate (within HMRC guidelines) to cover fuel, mileage and wear & tear.

12. Insurance

TEF's liability insurance (public liability / employer liability, as appropriate) covers volunteers while acting within the scope of their authorised roles. Volunteers must be informed of the scope and any limitations of cover by the Finance Director, John Atherton, or their direct supervisor.

TEF does not insure volunteers' personal possessions including cars and mobile phones; volunteers are responsible for insuring their own belongings.

If TEF involves volunteers in driving or transporting beneficiaries, TEF must ensure that the volunteer's motor insurance covers this activity (often as "social, domestic and pleasure plus volunteer use" or equivalent). TEF may require volunteers to confirm such cover in writing and provide a copy of their insurance and driving license to the Finance Director/ direct supervisor on request.

TEF should regularly review insurance policies to ensure they remain adequate in light of volunteer activity expansion or change.

13. Confidentiality and Data Protection

TEF will ensure volunteers are aware of and comply with its confidentiality / data protection policy. Volunteers may handle personal data (beneficiaries, supporters, staff), and must treat all data in accordance with GDPR and TEF's internal procedures.

Volunteers will be asked to sign a confidentiality agreement/policy or clause in their volunteer agreement, making clear obligations and sanctions for misuse of confidential information.

Any breaches of confidentiality must be reported promptly to TEF's Data Protection Officer (John Atherton), or designated supervisor and handled in line with TEF's breach procedure.

14. Safeguarding, Health & Safety and Risk Management

Given TEF works with children and adults who are considered vulnerable /at risk, safeguarding is a core responsibility.

TEF must maintain up-to-date safeguarding policies, procedures, training, reporting and response protocols. All trustees, staff and volunteers must adopt these standards.

Volunteers should be made aware of TEF's safeguarding procedures (how to report concerns, confidentiality, whistleblowing) and receive regular refresher training/policy updates.

TEF must assess and manage risks associated with volunteer roles (via standard health & safety risk assessments), and take reasonable steps to protect volunteers from harm.

Where volunteers work remotely, lone or online, relevant risk mitigation and safeguarding specific to those modes must be in place (e.g. online safeguarding, supervision, reporting)

Any incident affecting a volunteer (accident, harm, complaint) should be recorded and handled under TEF's incident/complaints procedure; serious incidents involving volunteers may require reporting to the Charity Commission (if threshold met) or relevant external authority.

15. Settling Differences, Complaints and Grievances

TEF aims to treat volunteers fairly and consistently. Volunteers' views should be encouraged, heard and acted upon promptly wherever possible.

Information on how to raise complaints or grievances should be clearly shared with volunteers (both informally and formally). The first point of contact should normally be the volunteer's supervisor or named lead.

TEF will attempt informal resolution initially, with support to both volunteer and TEF side. Where informal resolution fails, TEF's formal grievance or complaint procedure (which includes volunteers) will be followed.

If a volunteer's conduct is repeated or seriously unacceptable, TEF reserves the right to reassign tasks, suspend, or terminate their volunteering, following a fair process. The volunteer should be informed in writing, and opportunity provided to appeal, unless immediate removal is necessary for safety reasons.

16. Volunteer Agreement (Optional)

TEF may issue a volunteer agreement or letter of understanding, setting out mutual expectations, but explicitly stating that it is not a contract of employment and does not confer employment rights. (This helps avoid confusion and legal risk)

It should include what TEF will provide (induction, training, supervision, insurance, expense reimbursement) and what TEF expects (adherence to policies, confidentiality, agreed tasks).
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The volunteer agreement should be framed using language of hopes and expectations rather than obligations or mandates, avoiding contract-style wording (e.g. "will do", "must") or reference to penalties.

17. Monitoring, Evaluation and Review

TEF should routinely monitor volunteer satisfaction, feedback, retention and impact (through surveys, exit interviews, periodic reviews and informal meetings/discussion). This helps inform improvements to the volunteer

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This policy and all volunteer procedures (induction, safeguarding, expenses, training) will be reviewed annually (or more often if legislative changes or significant incidents occur).

Any change in legal or regulatory environment (e.g. Charity Commission, DBS, data protection) will prompt immediate policy review.

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Next Review Due:	

SERIAL	REFERENCE DOCUMENT/POLICY
1	The Elizabeth Foundation – Equal Opportunities and Race Relations Policy, TEF-EO&RR-01
2	The Elizabeth Foundation – Recruitment and Selection Policy, TEF-R&S-01
3	The Elizabeth Foundation – Adverse DBS and Disqualified Person Policy, TEF-ADBS-01
4	The Elizabeth Foundation – Volunteer Induction Policy, TEF-VI-01
5	The Elizabeth Foundation – Staff Development Policy, TEF-SDEV-01
6	The Elizabeth Foundation – Financial Control Policy, TEF-FIN-01
7	The Elizabeth Foundation – Confidentiality Policy, TEF-CON-01
8	The Elizabeth Foundation – Complaints Procedure Policy, TEF-COMP-01