

## **CITIZENS ADVICE REIGATE AND BANSTEAD MANAGING VOLUNTEER PERFORMANCE POLICY AND PROCEDURE**

### **Aim of procedure**

Citizens Advice Reigate and Banstead wants to ensure that all its volunteers are adequately supported and supervised to work to the performance and behavioural standards required. Citizens Advice Reigate and Banstead is committed to addressing any issues in performance, behaviour or attitude via support and supervision. The management of volunteers within Citizens Advice Reigate and Banstead will be fair, transparent, objective and respectful.

Should any problems arise with volunteer performance, they will be dealt with under the process outlined below and the volunteer will be made aware of the particular issue in writing. At each stage of the process, the volunteer will be informed of what it entails and who will be involved.

This is not a disciplinary process, but should a volunteer be believed to have acted in a manner that has affected or could seriously affect Citizens Advice Reigate and Banstead or its service to clients, Citizens Advice Reigate and Banstead will follow the process outlined below in: [Exceptionally poor performance and behaviour](#).

A volunteer can be accompanied to any meeting by someone from Citizens Advice Reigate and Banstead (either a paid staff member or volunteer) at any stage of the process, but their role will be as a supporter, not an advocate.

At all times any volunteer in Citizens Advice Reigate and Banstead will be aware of whom they report to. This may be a manager, a supervisor or someone else.

### **Who does this procedure apply to?**

This procedure is for the purpose of handling performance or behaviour issues for serving volunteers or volunteers who have left within the last three months.

This procedure is not intended to be used for trustee behaviour and performance. Each trustee board has its own code of conduct, systems and procedures.

### **Volunteer performance management process**

Throughout the performance management process, details of the issue will only be shared with the relevant people in Citizens Advice Reigate and Banstead. This will include the person to whom the volunteer reports and may also include anyone in a volunteer support role, such as a guidance tutor or supervisor. At no time will details be shared more widely within Citizens Advice Reigate and Banstead. This is particularly relevant to the trustees, as they need to remain independent in case the volunteer later wishes to raise a complaint to the trustee board.

Throughout the process, the volunteer will be given reasonable notice of any meetings and clear information about what is to be discussed, and will be able to put over their point of view. Each meeting should be properly minuted and the minutes agreed by both parties.

At the start of each step, the senior person involved should review the situation and confirm that the volunteer has been dealt with properly and fairly so far.

## **Informal**

In the first instance problems will be picked up during regular support and supervision meetings with the volunteer concerned and via the advice session supervision or other quality management processes. These meetings will be undertaken by the person to whom the volunteer reports. Many 'problems' are simply due to a lack of skills or knowledge, or a lack of support, inappropriate roles and so on, and will be relatively easy to put right. Consideration should be given to any special requirements the volunteer may have and reasonable adjustments made.

A written record of any supervision and support meetings will be kept. Action agreed by both parties should be followed up within an agreed and appropriate timescale. Sometimes, a volunteer may be unaware that they are doing something wrong. It is important to communicate to the volunteer what is expected of them and to feed back on their progress. They cannot be expected to improve or alter the way they work unless the need for change is brought to their attention and discussed so that they understand the problem.

Informal methods of resolution may include coaching, shadowing or training, other forms of learning, one-to-one support, or even a change of role. Citizens Advice Reigate and Banstead will consider other suitable roles for its volunteers where appropriate.

## **Formal**

If informal measures do not resolve the problem the volunteer will be informed in writing of the issue(s) and invited to a formal meeting with the person to whom they report. The meeting should be held without unreasonable delay but allowing the volunteer reasonable time to prepare. The aim of the meeting is to agree an action plan to remedy the problem and improve performance or behaviour, with appropriate timescales. The volunteer will be reminded what the problem is and what standards they need to achieve. The volunteer will be able to put forward their point of view and explain the situation from their perspective. The agreed action plan will be confirmed in writing to the volunteer after the meeting.

If the issue is not resolved within the agreed timescale, a meeting involving the volunteer, the person to whom the volunteer reports and a senior manager will be called at reasonable notice (not less than one week). This meeting may result in the volunteer being asked to leave.

## **Exceptionally poor performance and behaviour**

If a volunteer is believed to have behaved in a manner that has or could have seriously affected Citizens Advice Reigate and Banstead they can be immediately removed from their volunteer duties while the matter is investigated by the person to whom they report. The volunteer will be informed of this in a face-to-face meeting where Citizens Advice Reigate and Banstead will outline the concerns and proposed action. The volunteer will also be notified in writing. The investigation will be completed within 20 working days.

If, after a thorough investigation, it is decided that the volunteer's performance or behaviour is sufficiently damaging to the Citizens Advice Reigate and Banstead, they

will be asked to leave. This decision will not be taken lightly and the volunteer will be given written reasons, the opportunity to consider the outcome of the investigation and a chance to put their case forward at a mutually convenient meeting with the chief officer or other relevant manager prior to the final decision being made.

Examples of exceptionally poor performance or behaviour are as follows:

- Theft.
- Bullying / harassment.
- Violence.
- Breaching policies: confidentiality; impartiality; independence.
- Bringing Citizens Advice Reigate and Banstead and service into disrepute (e.g. by going to the press or contacting funders).
- Acting in a way that conflicts with the interests of Citizens Advice Reigate and Banstead or the wider Citizens Advice service.
- Deliberately looking up client records not entitled to see.

## **Review**

If the volunteer is not happy with the decision, they can ask for a review by the chair of trustees. The volunteer must ask for the review in writing. The chair may delegate the matter to a fellow trustee. The review will take place within 20 working days. The chair or trustee will review the performance management process and how decisions were made. This may include speaking to individuals involved. They will ensure that a proper process was followed, that any decisions reached were made fairly and were reasonable, and that no issues were left outstanding.

If the trustee agrees that the performance management process was undertaken fairly and properly, they will explain this in writing to the volunteer, and include their reasoning.

The letter will make the volunteer aware that they have the option of referring the matter to Citizens Advice.

If the chair or trustee disagrees that the process was undertaken fairly and properly, they will ensure that it is undertaken again to resolve the issues which need to be resolved, and will agree a timescale for doing so.

If a volunteer has decided to leave or been asked to leave Citizens Advice Reigate and Banstead and their complaint is about the circumstances that led to them leaving, Citizens Advice Reigate and Banstead must handle the complaint under the volunteer complaints procedure.

## **Citizens Advice**

Where the volunteer still feels that they have been treated unfairly or that issues remain unaddressed or unresolved by the Citizens Advice Reigate and Banstead, they can ask Citizens Advice to review the matter.

If the volunteer wants to pursue this they must put their complaint in writing, providing details of their concerns to [volunteer.complaints@citizensadvice.org.uk](mailto:volunteer.complaints@citizensadvice.org.uk). They must do so within 4 weeks of receipt of the review letter and should inform Citizens Advice Reigate and Banstead of their intentions. In exceptional circumstances, there may be

an extension to that deadline. Complaints submitted after 4 weeks should give an explanation for delay.

Citizens Advice will deal with the review within 30 working days of receipt of the paperwork. If deemed necessary, Citizens Advice may contact the individuals concerned.

Citizens Advice will check that the correct process was followed and that the outcome was a reasonable one. If so, Citizens Advice will inform both the volunteer and Citizens Advice Reigate and Banstead. The decision will be final.

If it is felt that the correct procedure has not been followed or the outcome was not reasonable, the review may direct Citizens Advice Reigate and Banstead to take relevant action, if necessary with the support of Citizens Advice. Complainants should note that Citizens Advice cannot direct Citizens Advice Reigate and Banstead to re-engage a volunteer.