

CITIZENS ADVICE REIGATE AND BANSTEAD VOLUNTEER COMPLAINTS POLICY AND PROCEDURE

1. Introduction

Citizens Advice Reigate and Banstead wants to ensure that volunteers feel able to raise complaints about the way they are being treated in the knowledge that they will be dealt with in a way which is fair, transparent, objective and respectful. Volunteers will be made aware of each stage of the process, what it will entail and who will be involved. While it is important for the process to be based on the principles of a sound grievance procedure, it is not appropriate for the two to be the same.

2. Scope

Any serving volunteer (including trustees), or a volunteer who has left within the last three months may use this procedure. If a volunteer has decided to leave for a reason not associated with behaviour or performance, the complaint must be handled under this procedure. The Managing Volunteers Performance Procedure should be used for all matters relating to behaviour or performance.

3. Principles

Volunteer complaints should be handled according to the principles underpinning Citizens Advice Reigate and Banstead approach to complaint handling. The intention in complaint handling should be to resolve the matter at the earliest stage. There should be acknowledgement of responsibility with an explanation or apology where appropriate.

4. Complaints process

Throughout the complaints process, details of the complaint will only be shared with the relevant people. 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 complaint reaches Stage 2. People involved in making decisions on complaints at one stage will not be involved in making decisions at a further stage.

5. Meetings

- A volunteer making a complaint can be accompanied to any meeting by someone from the bureau (either a paid staff member or volunteer) at any stage of the process but their role will be as a supporter, not an advocate.
- All meetings will be minuted and minutes agreed by both parties.
- At any point the bureau may consider the use of external, independent mediation services to resolve the issue.

6. Informal stage

Volunteers are encouraged to raise any complaints informally with the person to whom they report [Volunteer Co-ordinator, Advice Session Supervisor, Training Manager, Advice Services Manager, CEO] or some other appropriate person if the complaint is about the person to whom they report. Complaints can be made verbally or in writing, but notes of the complaint should be made as soon as possible. This person will keep a record of any discussion and ensure that agreed action is followed

up in a timely manner. If the volunteer raises a complaint of bullying, harassment or abuse, the dignity at work policy for volunteers should be consulted.

7. Formal stages

7.1 Circumstances for formal complaint

If the complaint the volunteer is raising is likely to have an impact on Citizens Advice Reigate and Banstead in its entirety, they should follow the whistle-blowing policy.

A more formal process must be followed if the volunteer feels that:

1. the informal process did not address their complaint
2. they are unable to approach the person to whom they report because they perceive them to be the root of the problem.

7.2 Stage 1

The volunteer must put their complaint in writing to the person to whom they report, or to a more senior manager, as appropriate. If the complaint is against the CEO, then it should be made directly to the chair of trustees. Care should be taken to ensure that the person investigating the complaint does not involve all the trustees as this may jeopardise the review process.

If the complaint be about the trustees, Citizens Advice Reigate and Banstead will consult CITA Direct helpdesk and respond to the volunteer.

The person investigating the complaint must be someone who is neither implicated in, nor part of, the complaint. They need to reach a full understanding of the problem. They will need to talk to the volunteer and may need to interview other staff or volunteers. They will also examine any written material, as appropriate. Whoever is investigating should consult the guidance on conducting investigations on BMIS and keep notes and records of what they have done and how they reached their decision.

The complaint will be investigated within 20 working days of receipt.

The decision made by the person investigating will be explained clearly, first face-to-face, and then in writing to the volunteer. They will ensure that all issues raised have been fully addressed. If the person investigating feels that any issues do need to be resolved, the letter will set out how this will be achieved and a timescale.

The letter will also clearly set out details of the second stage of the process.

7.3 Stage 2

If the volunteer remains dissatisfied with the way their concerns have been handled, or feels that there are issues which remain unaddressed, then they can refer their complaint to the chair of the trustees – who may delegate the matter to a fellow trustee or a person independent of Citizens Advice Reigate and Banstead (e.g. if he or she has a conflict of interest). The volunteer must refer their complaint in writing.

The chair or trustee will review the way the initial complaint was handled and how decisions were made. They will ensure that a proper process was followed, that any decisions reached were made fairly and accurately, and that no issues were left outstanding.

The review will be undertaken within 20 working days of the request.

If the trustee believes that the process followed by the person who made the original investigation was fair, then 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 their complaint to Citizens Advice (CitA).

If the trustee believes that the process was not fair, then they will instruct another investigation, identifying the issues which need to be resolved and a timescale for doing so. This investigation will be undertaken by someone not involved in the original one.

8. Citizens Advice (CitA)

Where the volunteer still feels that issues remain unaddressed or unresolved or that their complaint has not been treated fairly by Citizens Advice Reigate and Banstead, they can ask CitA to review their complaint.

If the volunteer wants to pursue their complaint to this stage, they must put it in writing, providing details of their original grounds and why they feel the complaint has not been properly addressed at local level, to volunteer.complaints@citizensadvice.org.uk. They must do so within 4 weeks of receipt of the stage 2 decision and inform their bureau 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.

CitA will deal with the review within 30 working days of receipt of the paperwork.

CitA will check that the correct process was followed and that the outcome was a reasonable one. If so, CitA 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 CitA. Complainants should note that CitA cannot direct a bureau to re-engage a volunteer.