

Addressing Concerns About a Volunteer Policy

People Directorate

Policy number: VOL 3

Issue number: 001

Issued by: Volunteering Team

Date issued: March 2025

Date last reviewed: March 2025

Review date: March 2027



**Because no one
should face death
or grief alone**

Contents

1. Equity Statement.....	3
2. Introduction	3
3. General Principles	3
3.1 Identifying and investigating problems	3
3.2 Step 1 - Investigating the issue.....	4
3.3 Step 2 – Taking action	4
3.4 Step 3 - Possible solutions	5
3.5 Step 4 - If the problem continues.....	6
3.6 Volunteer complaints	6
3.7 Learning and improving.....	7
4. Eligibility	7
5. Responsibility	7
6. Associated Policies and Procedures	8
7. Appendices.....	8

1. Equity Statement

Sue Ryder designs and implements policies, procedures and ways of working that meet the diverse needs of our clients, service users and employees. We ensure that our policies don't discriminate and consider the unique needs of certain identities and communities. This document has been reviewed to ensure that no one receives less favourable treatment on the protected characteristics of their age, disability, sex, gender identity and expression, sexual orientation, marriage and civil partnership, race, religion or belief, pregnancy and maternity. We consider the provisions of the Equality Act 2010 whilst going above and beyond to protect people who aren't protected in the act, for example, non-binary people.

2. Introduction

Volunteers bring many benefits to the charity, but sometimes there are problems. Taking fast, fair action to solve issues reduces the risk that volunteers will leave. This guide explains how to manage issues with volunteer performance. Please see our Talk to Us – Volunteer Complaints Policy to find out more about managing complaints made *by* a volunteer.

3. General Principles

3.1 Identifying and investigating problems

Performance-related problems with volunteers could include:

- volunteers struggling to do what the role asks
- volunteers doing too much and feeling overwhelmed
- difficult behaviour, such as not getting on with others or not turning up when they say they will

Behaviour-related issues are more serious. This could be any situation or incident where a member of staff, service user or member of the public is subjected to behaviour which has the potential to cause harm. This could include:

- disruptive, challenging, aggressive and or violent behaviour
- bullying or harassment, including prejudice and discrimination
- sharing confidential data
- fraud or stealing funds
- being under the influence of alcohol or drugs

- deliberate and serious damage to property
- serious breach of health and safety obligations
- serious breach of the organisation's rules, policies and procedures
- serious misuse of computer, email or internet facilities
- bringing the organisation into disrepute

3.2 Step 1 - Investigating the issue

Talk to the volunteer and find out the facts. If the problem involves several volunteers, try to speak to all involved. If you are investigating an issue, you must:

- avoid taking sides
- listen to what people have to say
- stick to facts
- avoid blame

3.3 Step 2 – Taking action

The number of times you attempt resolution will depend on the severity of the issue. For more serious problems and behaviour-related issues, you might need to take steps to end the volunteer's role with the charity at any point in this process.

Arrange a time and date to meet with the volunteer. A discussion about performance is something that needs to be done in person, but you can email or phone to let them know that you want to talk in advance, which gives the volunteer some time to reflect and prepare. You should also come prepared, not only with the issues but also with potential solutions. During your initial email or phone call should avoid making the volunteer feel anxious or like they're not good enough. You need to be reassuring and let them know that you're there to help them.

Explain to the volunteer what the problem is and the impact it has had. They may be unaware of the issue, and drawing their attention to it could fix things. Avoid blaming the volunteer, as the problem may not be their fault. Approach it as trying to tackle the problem together.

Decide with the volunteer what they would like to happen and how you'll try to solve the problem. Involving volunteers in the solution will help make it a success.

Finally, agree on when and how you will review progress.

It is essential to make a record of the issues and the actions you have taken to address them, however small. This should be saved on People Hub or the Volunteer Database in the **comments section**. Appendix 1 provides a template for this. Any records should be stored securely and destroyed once the volunteer leaves.

3.4 Step 3 - Possible solutions

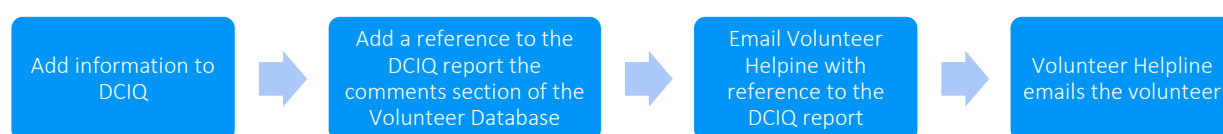
If the issue remains, arrange a second meeting with the volunteer. Be flexible and open to doing things differently. Here are some solutions you could try:

- Re-explain the role and expectations. A reminder of the role, its boundaries and what you expect from the volunteer may solve the issue.
- Offer more support or training. Sometimes it takes people a little longer to learn new skills. If the volunteer is struggling with their role or part of it, they might need more support.
- Change their tasks. If a task is causing an issue, see if someone else could do it or if the volunteer could do it in another way.
- Offer another role. If the role isn't meeting the volunteer's expectations, see if they can support you in another way. Set a time frame for trying out any new roles, approaches or behaviour.

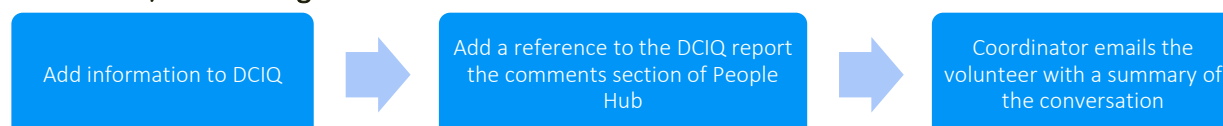
Be clear with the volunteer what will happen if the problem isn't solved by a set date, which may involve taking steps to end the volunteer's role with the charity.

It is essential to make a record of the conversation. Please follow the process below:

Retail:



Healthcare/Fundraising:



Appendix 2 provides a template for the email to the volunteer.

3.5 Step 4 - If the problem continues

If you follow the previous steps and conclude that you can't fix the situation, then it might be time to let the volunteer go. The volunteer should have been given ample opportunities to amend conduct or behaviour before this point unless the behaviour is severe enough to warrant an immediate dismissal. The following steps should be taken:

- Schedule a meeting with the volunteer in a private setting and have a third-party present. This could be another member of the volunteering team, or an impartial colleague such as a member of the shop team, a Cluster Manager, or a member of the Wellbeing and Community Team. Retail colleagues must inform their Retail Volunteer Coordinator of the meeting.
- At the meeting, state the reasons for dismissal. Prepare this before the meeting and reach out to your Volunteer Manager or a member of the Volunteering Team if you need any support to do so.
- Focus any comments on describing how their behaviour or performance deviates from what is expected. Avoid any personal issues, assumptions about their life or intentions, or value comments.
- Secure the return of any keys, parking passes, name tags, files, marketing materials, or other work-related items before you conclude the meeting. Be sure you change any passwords for databases to which they have access.

It is essential to make a record of the conversation. Please follow the process below:

Retail:



Healthcare and fundraising:



Appendices 3 and 4 provide templates for this.

3.6 Volunteer complaints

If the volunteer wishes to submit a complaint before leaving, they are welcome to do so. The Talk to Us – Volunteer Complaints procedure outlines how this is done.

3.7 Learning and improving

Problems are an opportunity to learn and think about how to do things better. This will help avoid issues in future.

- Check that your roles meet volunteer expectations
- Review how you recruit volunteers. Do you expect them to come with certain skills or abilities and do you check this?
- Make sure your local induction and training covers what it needs to. You should also check that volunteers find it useful
- Make sure the support volunteers get is right for the role they do

4. Eligibility

In the context of this policy, a volunteer is a person who performs a service willingly and without pay to support Sue Ryder's work. This includes people spending time with Sue Ryder through work experience, supported volunteering programmes, and those who are referred to the charity through community sentencing.

The policy is for all Sue Ryder volunteers and any Sue Ryder staff who work alongside or provide support to volunteers.

5. Responsibility

Individuals

Volunteers are responsible for attending planned meetings and responding to emails or phone calls relating to performance issues.

Managers

Managers are responsible for identifying and investigating issues, planning and facilitating meetings with volunteers and witnesses (if needed), and recording all conversations using the templates provided and storing them correctly. Managers are also responsible for managing any administrative tasks associated with a volunteer leaving, if required.

Volunteering Team

The Volunteering Team are responsible for supporting Managers when needed. This could include guiding conversations, attending meetings as a witness, or providing guidance on difficult decisions.

6. Associated Policies and Procedures

Sue Ryder Volunteering Policy

Talk to Us – Volunteer Complaints Policy

7. Appendices

Appendix 1 – Template record (Step 2, first meeting)

Appendix 2 – Template email (Step 3, second meeting)

Appendix 3 - Template email (RETAIL - Step 3 asking a volunteer to leave)

Appendix 4 – Template email (HEALTHCARE AND FUNDRAISING - Step 3 asking a volunteer to leave)

Appendix 1 – Template record (Step 2 first meeting)

This can be copied and pasted into the comments section of People Hub or the Volunteer Database.

Date of meeting:

Staff name:

Staff job title:

Issue raised:

Summary of conversation with volunteer:

Agreed actions:

Review date:

Appendix 2 – Template letter (Step 3 second meeting)

This can be copied and pasted into an email.

To [volunteer name]

Re: Volunteering activity, performance concerns

This email is to confirm that we have met for a second time to discuss [insert details, e.g. unsatisfactory performance/misconduct/behaviour], which is in breach of [e.g. organisation policy/our values and behaviours/our expectations of you].

On [insert date] we initially met to discuss our concerns about your activity as a volunteer. Specifically, we discussed:

- [issue]
- [issue]
- [issue]

During that meeting, we agreed on a set of actions, and you confirmed that you understood what was required of you. However, we are still concerned that your actions do not align with our organisational values and behaviours.

As discussed in our meeting on [date], if you do not adjust your behaviour and maintain those changes, we will need to have additional performance discussions, which may lead to the termination of your volunteering agreement.

I hope that you will respond positively so we can continue to work with you as a volunteer.

[Staff name]

[Staff job title]

Appendix 3 – Step 4 (RETAIL Template email – asking a volunteer to leave)

This can be copied and pasted into an email.

Dear Volunteer Helpline,

I am writing to confirm that [volunteer name] from [location] is no longer a volunteer with Sue Ryder as of [date].

The reasons for their dismissal are:

- [factual list of reasons]

Unfortunately, all efforts to rectify these issues have not been successful.

[Volunteer names] has been asked to return all Sue Ryder-related materials to us, specifically:

- [list of property e.g. badge/key/laptop]

While their actions have not met with our organisational values and behaviours, we would still like to thank them for their contributions in the past and their support for Sue Ryder. We are truly sorry that this has not worked out as we both had hoped.

[Volunteer name], please reply to this email to communicate any questions or issues about your dismissal.

Sincerely,

[Signature]

[Name][Title]

Appendix 3 – Step 4 (HEALTHCARE AND FUNDRAISING Template email – asking a volunteer to leave)

This can be copied and pasted into an email.

Dear [Volunteer name],

I am writing to confirm that, following our conversation on [date], you will no longer be a volunteer with Sue Ryder as of [date].

The reasons for your dismissal are:

- [factual list of reasons]

Unfortunately, all efforts to rectify these issues have not been successful.

We request that you please return all Sue Ryder-related materials to us, specifically:

- [list of property e.g. badge/key/laptop]

While your actions have not met with our organisational values and behaviours, we would still like to thank you for your contributions in the past and your support for Sue Ryder. We are truly sorry that this has not worked out as we both had hoped.

Please reply to this email to communicate any questions or issues about your dismissal.

Sincerely,

[Signature]

[Name][Title]