



VOLUNTEER POLICY

Version:	1.0
Effective From	07.02.2024
Author:	Practice Governance and Training Sub-Committee
Review date:	07.02.2027

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Purpose of Volunteer Policy

The Volunteering Policy sets out Cruse Scotland Bereavement Support (Cruse Scotland) approach to the involvement of volunteers volunteering across the organisation and applies to all Cruse Scotland volunteers, including the Board of Directors. This is not intended to create a legally binding relationship or contractual agreement. The engagement will be binding in honour only, there being no legal agreement between Cruse Scotland and the volunteer.

This policy should be used in conjunction with all Practice Policies and Organisational Policies that apply to volunteers as listed in Appendix 1

Statement on the role of volunteers

Cruse Scotland could not exist without our volunteers and the unique role they have within our organisation. The skills and experience which volunteers bring to Cruse Scotland allow us to provide the high quality of service to our bereaved clients. Volunteers also enable the organisation to develop strong links in our communities throughout Scotland, raising awareness of Cruse Scotland and the work we do.

Through their roles with Cruse Scotland, volunteers have the opportunity to develop new skills, meet new people and undertake varied and rewarding activities.

Cruse Scotland volunteers are based in specific geographical Areas run by an Area Manager. An Area Administrator/Co-ordinator in each Area will be responsible for the day to day management, guidance and support of volunteers.

Definition of a 'volunteer'

A 'volunteer' is anyone who gives of their time and skills freely, and adds value to an organisation without payment or expectation of payment other than reimbursement of expenses incurred in the course of their voluntary role. A volunteer must have successfully completed the Cruse Scotland recruitment procedure and any necessary training before taking up their role and will then be placed on the volunteer database. Only at this point is the person recognised as a registered volunteer.

Equality and Diversity

Please also read Equality policy (accessible on Cruse Scotland website)

Volunteer Agreement

During the Induction process volunteers will be given a copy of the Volunteer Agreement relevant to their particular role. This will be signed both by the volunteer and Area Manager. The volunteer will retain a copy and the other will be placed securely in the volunteer file.

Cruse Scotland's commitment to volunteers and volunteers' commitment to Cruse Scotland

Cruse Scotland commitment to volunteers:

- to be valued as an individual
- to be respected for their skills, dignity and individual needs
- to have support, feedback, appreciation and encouragement
- to have opportunities to contribute to developments
- to have opportunities to discuss concerns or problems relating to their roles
- not to have their roles changed without prior discussion
- reimbursement for out of pocket expenses
- to be insured
- that Cruse Scotland has agreed policies on volunteering
- up to date information about the organisation and its development
- information about philosophy, policies and procedures
- clear guidelines within which to carry out duties
- a clearly defined role and to be enabled to carry out their role
- opportunities for training, both general and specialised, to assist in their volunteer role
- structured working
- a safe and healthy working environment
- to reserve the right to say no Volunteers Commitment to Cruse Scotland
- Cruse Scotland asks volunteers:
 - to work both with clients and each other in line with the COSCA Statement of Ethics and and Code of Practice found here:
https://www.cosca.org.uk/application/files/1915/2119/7097/Statement_of_Ethics_C_URR_ENT_Nov_1412-08-14.pdf
- to show commitment to the organisation
- to treat everyone with respect and courtesy
- to have a flexible approach to their duties
- to be sensitive and tactful in their dealings with others
- to adhere to Cruse Scotland policies and follow procedures and guidelines
- to be punctual
- to be reliable and regular in their attendance
- to inform the organisation in case of absence
- to respect confidentiality
- to have read and understood volunteer policy and guidelines
- to attend regular supervision if they work with clients (see Supervision Policy – found on learnPro platform
- to be prepared to undertake training necessary to their role
- to carry out their duties to the best of their ability

- to discuss concerns with the appropriate manager
- to consult with the appropriate manager if in need of help/guidance

Confidentiality Policy

Please also read Confidentiality Policy (accessible on the Cruse Scotland website)

Communications Policy

Please also read Communications Policy

All volunteers must adhere to the Cruse Scotland Communications Policy. Volunteers are not permitted to speak on behalf of Cruse Scotland to the press unless specifically asked by a senior member of staff.

Volunteer role descriptions

Role descriptions will include an outline of the purpose and duties of the role and capabilities required to undertake the role. Before any new area of volunteering is developed, a description of the tasks which may be undertaken by volunteers is drawn up. A full list of volunteer role descriptions are available.

Recruitment and selection

Serious consideration is given to every application and prospective volunteers are interviewed by two people, except in exceptional circumstances. Two references are required, one of which should ideally be from a previous employer, volunteer manager or equivalent, or a person of good standing in the local community. References from relatives are not accepted. For those working with children and young people, a disclosure under the PVG scheme is carried out (please see section 2.4). A check to validate the identity of the applicant is required during the recruitment process for all volunteers.

A separate recruitment and selection process exists for Board recruitment.

Client facing volunteers must have the relevant accredited skills or be prepared to undertake the training necessary for these roles.

Volunteer records and GDPR

Cruse Scotland adheres to the requirements of GDPR legislation and a copy of the GDPR Policy is available on request. Confidential records detailing volunteer names, addresses, telephone numbers are held on the Cruse Scotland Database. Original copies of the volunteer application form, references and interview notes are also held in volunteer personal files, or in the case of Board Directors by the Chief Executive's office. In addition, start dates, area of volunteering and training undertaken are noted both in paper records and on the database.

Cruse Scotland staff will also maintain file notes relating to key issues raised by or discussions with volunteers in order to ensure effective volunteer support and management.

Disclosure Certificates are destroyed as soon as possible after recruitment is finalised. A record containing the volunteer's name, the type of Disclosure and the number of the certificate is held on the Database.

Volunteers are welcome to have access to their personal record following a request in writing to Headquarters. Information about volunteers will not be passed on without the prior consent of the volunteer concerned.

Child protection

Please also read the Child Protection Policy (accessible on the Cruse Scotland website)

All volunteers with any involvement with children must adhere to the organisation's Cruse Scotland Child Protection Policy. Any issues arising will be dealt with through this policy, the requirements of PVG and the Volunteer Policy as appropriate.

Protection of Vulnerable Groups (PVG)

Cruse Scotland is committed to providing a safe and protected environment for clients at all times.

Adults in receipt of bereavement support are considered to be 'protected adults'. Therefore all volunteers in contact with bereaved clients will be required to be a member of the Protection of Vulnerable Groups scheme. During your volunteering role Cruse Scotland will rely upon all new vetting information provided further to that scheme and may take decisions concerning your volunteering on receipt of such information.

For individuals who come to Cruse Scotland with a Scheme Record and who are already members, Cruse Scotland will conduct a Scheme Record Update.

PVG Barring

In instances when vetting or referral information indicates that a person may prove a risk to children or vulnerable adults, Disclosure Scotland will consider all the information available before deciding whether a person should be placed under consideration for listing on one or both of the barred lists.

If, after careful assessment, a person is considered a risk and unsuitable to work with children, Disclosure Scotland will list them on one or both of the barred lists. This means that the person will not be able to become a PVG Scheme member in relation to one or both areas of work. It will be an offence for a barred person and for Cruse Scotland to permit that person to undertake such work.

An unsatisfactory disclosure arising during the volunteer recruitment and selection process will result in the candidate's application not being progressed further.

Expenses

Cruse Scotland strongly encourages all volunteers to claim reasonable out of pocket expenses incurred in the course of their volunteering. This includes travel: bus, train or car will be reimbursed, and any telephone calls made from home as an agreed part of their voluntary role. Any proposed activity beyond this list that will incur expense must be discussed and agreed with the Area Manager. All receipts or travel tickets must be kept and accompany any completed expenses claim form. Expenses claim forms can be obtained from the relevant manager or from the resources section of learnPro and should be returned to them for authorisation. Mileage will be reimbursed at the current Cruse Scotland mileage rate for volunteers.

Insurance

All registered Cruse Scotland volunteers are covered under the Professional Indemnity, Public Liability and Directors and Officers policies taken out by Cruse Scotland.

Health and Safety Please also read Health and Safety Policy and Lone Working Policy found on learnPro platform

Cruse Scotland requires that volunteers and staff exercise a duty of care to themselves and others with regard to Health and Safety. They are required to follow the Health and Safety Policy and co-operate in maintaining healthy and safe conditions and to avoid actions which may be detrimental to the health and safety of themselves and others.

Volunteers should not undertake any activity where they feel there is an element of risk attached to the task. They should discuss their concerns with the relevant manager/member of staff and only when the issue is resolved should the volunteer undertake the task/activity. Volunteers are required to sign a local Induction Checklist, which details the specific Health and Safety areas covered in relation to the volunteer role. The Cruse Scotland Health and Safety policy may be accessed through LearnPro.

Induction

All new volunteers are expected to attend a Cruse Scotland local induction which includes important Health and Safety information. A specific induction programme also exists for newly appointed Board Directors.

Introductory period

Volunteers are involved for an introductory period of three months. This gives volunteers an opportunity to be sure that this is what they want to do and gives Cruse Scotland the opportunity to make sure that individuals are suited to their particular volunteering role. An informal review will be held after three months to confirm or change the arrangement.

Keeping updated

Good communication is essential to safe and effective working within Cruse Scotland. Staff will make every effort to ensure information is sent out regularly. Meanwhile volunteers have a responsibility to make every effort to keep up to date with all information provided whether memos, notices, bulletins or newsletters and to ask if there is anything they are unsure about. The Cruse Scotland Website is also an essential and invaluable source of up-to-date information.

Guidance and support

Cruse Scotland aims to offer support to all volunteers and to have a clearly identified member of staff to whom they report. Client facing volunteers will be allocated a supervisor for regular sessions regarding their bereavement work. Group supervision is also available (not mandatory) for all volunteers. All volunteers will have their Area Manager as a point of contact. Because of the nature of Cruse Scotland, teamwork is important, and it is vital that staff and volunteers communicate well, provide support to each other, and therefore work well together.

Reviews

It is vital for the smooth running of the service that regular reviews are carried out. This is undertaken on an ongoing basis through informal discussion and team meetings. A more formal review happens annually. A Volunteer Review Form will be filled in by the volunteer and the contents discussed with a nominated member of staff or supervisor. Concerns should be raised with the relevant manager as they arise and not held until a review meeting. These are best dealt with on a one to one basis. The Volunteer Development Manager and Training Manager will monitor this process with the Area Managers.

Training

Please also read Developmental Pathways and also the Appeals Procedure found on LearnPro platform

Volunteers have access to a range of learning and development opportunities including dedicated training sessions, e-learning and Continuous Personal Development (CPD). Volunteers' learning and development needs will be discussed with them by their manager and arrangements made as necessary and appropriate. The Cruse Scotland Developmental Pathways gives client facing Skilled Listeners the opportunity to move to an Advanced Skilled Listener.

Problems and concerns

Cruse Scotland is committed to providing high quality support to clients and to volunteers and staff. It is fundamental to Cruse Scotland that good communications and good working relationships are established and maintained between Cruse Scotland volunteers, staff and clients. With a spirit of trust and respect between people working together, the number of occasions when serious problems arise should be minimal. However if they do, it is important that guidance exists on how to deal with the situation.

If a volunteer has concerns about their experience in Cruse Scotland they should follow the steps outlined below: In the first instance speak to their Area Manager. The aim is always to resolve issues locally whenever possible.

Should the volunteer still be unhappy with the outcome of these discussions they should:

Speak to the Volunteer Development Manager (or the Director of Client Services in their absence) who will then investigate the situation further.

Should the volunteer still be unhappy with the outcome at this point they should:

- Take their concern to the Chief Executive who will review the situation. The decision made at this step is final.

If a volunteer's activities do not meet with Cruse Scotland expectations or standards or appear to be working outwith the COSCA Statement of Ethics and Code of Practice, the Area Manager responsible and/or the Volunteer Development Manager will:

- Talk with the volunteer concerned and give every support and help to improve the situation. This may include the offer of further training.

If this proves unsuccessful, an alternative, more suitable role may be offered depending on circumstances.

If this action still proves unsuccessful, a discussion between the Manager, the Volunteer Development Manager and the volunteer will explore a possible way forward which may include asking the volunteer to stop volunteering.

In both of the above situations the volunteer will be encouraged to bring someone to support them during these meetings.

There may be times however when the situation is so serious that the volunteer may be asked to stop volunteering at an earlier stage in the process. Situations that would be considered very serious include: fraud, theft, serious breach of confidentiality, inappropriate behaviour towards clients, fellow volunteers or staff eg harassment, bullying, violence, social media incidents, breakdown of working relationships etc. (See the Cruse Scotland Dignity at Work Policy on learnPro).

Cruse Scotland staff will maintain confidential records relating to any incident/difficult situation involving a volunteer, including notes of any discussions or meetings held with the volunteer or other persons involved.

Time out

This policy section applies to all volunteers engaged in working directly with clients including Helpline volunteers. If non-client facing volunteers wish to have time out, they should speak to their Area Manager.

There is a wide range of factors which may lead to a volunteer wishing to take time out from their work with Cruse Scotland. These may include personal or family illness, a significant life event including bereavement, and so on. Volunteers are Cruse Scotland's most valuable asset so we will support any volunteer who wishes time out from their volunteering.

Cruse Scotland is an organisational member of COSCA and, as such, all volunteers and paid staff are bound by the COSCA Statement of Ethics and Code of Practice. There are a number of specific elements that are particularly relevant to a volunteer taking time out from their client work with Cruse Scotland.

From the Code of Practice: "Members continually monitor their practice and can recognise their inability to work effectively with a particular client or when their professional effectiveness is impaired. In such situations, members will promptly take the most appropriate action to serve the best interests of their client(s).

The functioning of an individual practitioner may be impaired by personal problems caused by, for example, illness, stress, life events, etc. An organisation may be affected by, for example, staff shortages, administrative difficulties, etc. The member must consider whether they should refrain from working with the client; make any appropriate referrals; and seek professional support to address their difficulties.

A member will ensure that their client is well-prepared for the suspension or termination of the working relationship.

Organisational members are responsible for ensuring the physical and psychological safety of their workers involved in providing services to clients.”

Requesting time out

The volunteer should discuss their wish to take time out with their Supervisor and explore how much time might be required. The volunteer and supervisor should agree what support or contact might be appropriate, if any, during the period of absence. The volunteer should complete the time out form which must be signed by the Supervisor and Area Manager and then passed to the Area Administrator where it will be entered on the database. A copy of the Time Out Request Form can be found in the resources section of learnPro.

Volunteers who take time out from working with clients following bereavement, and wish to return, should consult with their supervisor.

A volunteer may also take time out from working with Cruse Scotland clients following observations by their Supervisor that they are currently not fit enough emotionally or psychologically to work with clients. The volunteer may wish in due course to continue their involvement, and should consult with their supervisor if they have not already done so.

The readiness to continue with clients is an outcome of a process which is carried out in the best interests of the Cruse Scotland volunteer and Cruse Scotland clients. The Area Manager has the responsibility to manage the volunteer’s return to client work.

If the volunteer returns to Cruse Scotland within a year of the start of time out then no additional training is required. The meeting with the volunteer before their return will focus on the volunteer’s readiness to return, and jointly agreeing with the volunteer whether any reorientation activities are needed before beginning client contact. The Area office and Headquarters should be informed of the volunteer’s return.

Absences greater than one year

An absence from Cruse Scotland for more than one year may require more preparation for returning to client contact. The supervisor (and/or Area Manager) and volunteer should discuss what would be necessary and desirable. Such preparation may include:

a reintroduction to Area procedures and administrative processes information on changes which have taken place within Cruse Scotland since the volunteer took leave of absence

a review of the key principles of bereavement support. This might be done through reading and/or discussion, attendance at meeting(s) or CPD training

It is likely that the longer the volunteer's absence, the more substantial their process of reorientation should be.

In all cases the volunteer should meet with their supervisor and also have a meeting with the Area Manager. The Volunteer Development Manager should also be informed of the volunteer's return.

Absences of more than two years

Except in the most exceptional of circumstances, it will be assumed on the third

anniversary of the volunteer's absence that they are no longer a Cruse Scotland volunteer, and a letter will be sent to the person by the Area Manager, copied to Cruse Scotland Headquarters, informing them of this.

At a later date the person could reapply to Cruse Scotland to be accepted as a volunteer. In this case they would go through a similar process of selection to that of a new applicant. If selected, training requirements would depend on individual circumstances and would be at the discretion of the Area Manager.

Ending the volunteering relationship

We recognise that volunteers will end their relationship with Cruse Scotland for a variety of reasons. There will also be occasions when Cruse Scotland will find it necessary to end volunteering relationships. When a volunteer decides to leave Cruse Scotland, this is taken forward and initially acknowledged by their manager. We will ensure details are removed from the Database when a volunteer leaves in line with insurance and data protection requirements. A thank you email will be sent by the Volunteer Development Manager which includes a link to complete our Volunteer Exit Survey

Changes sheet

Date	Change Details	Author
31.01.2024	Updated policy with changes suggested by Dr Roz Scott. Branding updated.	Wendy Diack
25.07.2025	-Reformatted document to 2025 house style -Removed reference to LearnPro for accessing the Child Protection and Confidentiality Policy, replaced with 'on our website'	Ed Strutt