

WEA volunteer policy

Approach to developing and sustaining volunteers

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|-------------------|-----------|--------------|------|
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Contents

| | |
|--|----|
| Background | 3 |
| Purpose | 3 |
| Values | 3 |
| Scope | 3 |
| Equality and diversity | 3 |
| Procedures | 4 |
| 1 Recruitment and selection | 4 |
| 2 Training and support | 4 |
| 3 Expenses and insurance | 4 |
| 4 Recording impact of volunteering | 4 |
| 5 General expectations | 5 |
| 6 Problem-solving procedures | 5 |
| Appendix 1 - WEA volunteer expenses policy | 7 |
| Appendix 2 - WEA volunteer code of conduct | 13 |

Related documents

WEA governing document
WEA vision, mission and values
WEA financial regulations
WEA branch handbook

1. Background

The WEA has a proud tradition of voluntary and democratic practice and has been a membership organisation for over 100 years. Individuals, local communities and the Association all benefit from the networking and influence that arises out of volunteering. Volunteers contribute to the WEA charitable mission by giving their time freely and making a difference in their communities. Volunteers support the WEA in a range of roles, including organising courses through branches / Scottish local associations, acting as learning champions and classroom support and contributing to the governance of the Association. Regardless of role it is important that we protect volunteers by ensuring that volunteers are well looked after and that they are treated with respect and dignity. The hopes and expectations of volunteers must also be clear and understood by all staff and volunteers.

2. Purpose

The aim of this policy is to produce a clear framework for the deployment of volunteers in the context of the strategic aims and needs of the Association. This policy is intended to help promote a constructive partnership between volunteers and staff, tutors and students. The WEA is committed to making volunteering an enjoyable and worthwhile activity which meets both the individual's as well as the organisation's needs. This will include:-

- Celebrating the diversity of volunteers and their contributions to the work of the WEA
- Identifying routes and support to enable volunteers to move into governance roles at local, regional and Association level
- Ensuring that priorities and actions relating to volunteering are cross-referenced in all relevant strategic, operational and development plans

WEA asks that volunteers abide by the vision, mission and values, principles and policies which form the framework of the Association.

3. Values

- Volunteers are valued equally with students, tutors, staff and all other stakeholders
- The range and diversity of volunteers involved in the WEA should reflect our students and the communities in which we work
- Volunteering is welcomed and facilitated with minimal bureaucracy whilst protecting and supporting people and complying with relevant legislation and regulations

4. Scope

Anyone who is actively involved in the work of the Association, and gives their time freely is regarded as a volunteer. This policy outlines the expectations that will apply generally, however each role or function may also have additional procedures or regulations, such as the requirement for a DBS check. Further supporting information is available in the Branch Handbook. The trustees of the Association and anyone in a governance role, all of whom are volunteers, will have to comply with additional legal requirements which are detailed in the WEA governing documents. This policy covers the WEA's work across England and Scotland.

5. Equality and diversity

The WEA is firmly committed to diversity in all areas of its work and believes that opportunities should be open to all regardless of social class, gender, sexual orientation, disability, age, marital status, religion, colour, race or ethnic or national origin. We believe that we have much to learn from diverse cultures and perspectives and that teamwork promotes mutual interests, harmony,

respect, co-operation and understanding between people from diverse backgrounds. We will regularly evaluate and monitor our progress towards improving diversity.

6. Procedures

6.1 Recruitment and selection

We will not seek to limit the range of voluntary activities that may be undertaken across the Association, locally and regionally. However, we will identify the more common voluntary activities and provide related information as an annexe to this policy. Volunteers may be recruited and selected by a range of methods according to their suitability in helping meet the needs of planned activities. Some roles may need a structured process of recruitment and selection, including references and criminal record checks, and others will be more informal.

6.2 Training and support

We will provide development and training for staff to enable them to support volunteers consistently throughout the WEA. Volunteers can expect to be made to feel welcome and provided with an induction pack, role-specific guidelines and appropriate resources to feel confident in carrying out their planned activity. The safety and welfare of volunteers is paramount and there is a joint responsibility to risk assess any activity undertaken.

Volunteers can expect to have a named person, who may be another volunteer, who will be able to regularly discuss their volunteering successes and problems with them and give feedback on their volunteering activity. Any problems they may have will be dealt with sympathetically, fairly and transparently. WEA will aim to involve volunteers in discussions that may affect their role and when volunteers leave the WEA, we will seek to ascertain the reason and whether they want to be kept informed of WEA activities.

6.3 Expenses and insurance

It is the WEA's policy as set out in the Association's financial regulations to reimburse reasonable out of pocket expenses properly incurred whilst undertaking voluntary tasks, subject to the production of receipts, see WEA volunteer expenses policy (appendix 1). These may include:-

- Travelling expenses
- Miscellaneous expenses e.g. telephone calls, postage, refreshments (which must have been previously agreed)

Claim forms are available through regional / Scottish and Association offices and staff working with volunteers or on the WEA intranet - <https://intranet.wea.org.uk/volunteers/volunteer-policies>. Significant items, such as train travel to meetings, can be purchased in advance on behalf of the volunteer.

The WEA's public and employer's liability insurance policies cover the activities of volunteers but insurers will not cover personal belongings against loss or theft. Volunteers who use their own cars for WEA business are responsible for making sure they are adequately insured for the tasks they are undertaking.

6.4 Recording impact of volunteering

We will promote volunteering with the WEA through our marketing and by informing relevant local and regional organisations of volunteer opportunities, with the aim of promoting understanding, recognition and celebration of the work of volunteers. Volunteers who are members or students

are able to shape the work and direction of the Association, within its mission, through participation in its structures and consultations.

We will seek the views of active volunteers through various methods including surveys, WEA Connect calls and the member/volunteer newsletter to support the One WEA strategy. We will record appropriate information on volunteers, their characteristics and main activities on our management information systems and use standard monitoring reports to support this strategy and provide evidence to management and trustees. We will endeavour to identify appropriate, reasonable and objective measures of the impact and additional value of voluntary activity to the WEA and its work.

6.5 General expectations

Volunteers can expect to:-

- Be made welcome and to feel involved and valued
- Receive induction to the WEA and their role within it
- Have the name and contact details of the person responsible for their induction, whether this is a member of staff or another volunteer
- Receive adequate training and supervision to carry out their role
- Be able to withdraw volunteering services without notice¹
- Act in accordance with the WEA volunteer code of conduct (Appendix 2)
- Have any concern treated fairly and confidentially

6.6 Problem-solving

WEA believes that it is important to have procedures in place to ensure volunteers are treated fairly, without discrimination. The procedures laid out below provide consistency and demonstrates WEA's commitment to volunteering good practice.

Problems may arise in a number of ways. A volunteer may make a complaint about another volunteer, a member of staff or the WEA itself, or there may be concern about a volunteer's performance, attitude or conduct.

We would hope for most issues to be resolved locally, however the Head of Fundraising, Membership & Volunteering (and Head of Corporate Governance & Company Secretary where appropriate) can be consulted on and advise on complaints and concerns about volunteers as necessary.

Volunteer complaints

Should a volunteer need to make a complaint, this can be done through the WEA complaints procedure, which can be found at www.wea.org.uk/feedback.

Upholding the volunteer code of conduct

The need to hold a volunteer to account in relation to the WEA volunteer code of conduct (see appendix 2), can arise through either:-

¹ In the event of the closure of a WEA branch or Scottish local association (SLA), WEA reserves the right to contact and make requests of branch / SLA officers to enable the formal closure process to be completed, and until such time as the branch / SLA is notified that the closure process is complete.

- A complaint received about a volunteer via the WEA complaints procedure as detailed above
- An allegation of misconduct in relation to performance, attitude or behaviour, or uncovered as part of routine checks and balances in relation to the implementation of WEA policy or procedure

The general procedure for handling such cases is laid out below.

General procedure

- On notice of a complaint about or allegation of misconduct by a Regional Education Manager, Scottish Director, Feedback Manager, other member of staff or another volunteer, the relevant Area Education Manager or Senior Area Education Manager will conduct an investigation as appropriate
- If deemed necessary and, on approval of the relevant Regional Education Manager, the volunteer may be suspended from their role while the investigation takes place
- The volunteer will have the option to be accompanied and supported by a person of their choice to any meeting as part of the investigation
- The Area Education Manager or Senior Area Education Manager will decide to uphold or otherwise the complaint / allegation and advise the volunteer of their decision in writing within 20 working days
- If the complaint / allegation is upheld, the volunteer may be asked to stop volunteering for the WEA for good
- The volunteer may appeal the decision by writing to the Head of Fundraising, Membership & Volunteering who will investigate further and respond in writing within 10 working days

Governance volunteers (branch / Scottish local association officers, regional committees and non-trustee members of WEA council) have additional constitutional and legal responsibilities within their roles, therefore there is a separate procedure for those volunteer groups, available from the volunteering & membership team.



Adult Learning Within Reach

Appendix 1

WEA volunteer expenses policy

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|-------------------|---------------|--------------|------|
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1. Introduction and scope

The WEA has an obligation to ensure that the public funds it receives are used to achieve maximum value for money and that resources are directed as much as possible towards our education delivery.

The WEA recognises the pressures and constraints on budgets and this policy aims to make clear to volunteers their entitlements to out of pocket expenses in a clear and consistent way, whilst also recognising these constraints and ensuring compliance with HM Revenue and Customs (HMRC) and other statutory and audit requirements and obligations.

The purpose of this policy is to describe the WEA's approach to allowable reclaimable expenditure on volunteers travel, subsistence and other expenses while engaged on WEA business.

This policy applies to all volunteers in England and Scotland.

2. General principles

2.1 Legislative context

This is provided by HM Revenue and Customs (HMRC):
<http://www.hmrc.gov.uk/mileage/volunteer-drivers.htm>

2.2 Policy context

This expenses policy is an annexe to the WEA volunteer policy which includes links to other relevant policies of note, including WEA financial regulations and policies. The approach to volunteer expenses is consistent with staff expenses and all allowable expenses are reimbursed on actual expenditure, round sum allowances are not paid.

2.3 Related documents

- Volunteer expenses claim form
- Missing receipts declaration
- Rail card information (new addition – March 2015)

3. Responsibilities

3.1 Volunteers

Volunteers should ensure that their expenses are:-

- Claimed accurately in line with policy, and legitimately incurred for WEA business
- For activities which were authorised in advance by the relevant manager
- Made on the correct current expenses claim form
- Provided with all original supporting receipts and documentation attached
- Submitted to the relevant staff member for approval as soon as possible after being incurred

Important note: Activities likely to incur expenses for volunteers should be authorised by managers in advance – the WEA cannot accept liability for expenses arising from activities which have not been authorised.

3.2 WEA staff members

WEA staff members approving the expenses claim form undertake to:-

- Approve expenses claim forms as soon as possible and send promptly to the WEA purchase ledger centre
- Advise the volunteer of any queries / problems with the claim form, and do this promptly and before submitting the expenses claims form to the WEA purchase ledger centre

3.3 WEA purchase ledger centre

WEA purchase ledger centre undertakes to:-

- Process volunteer expenses claims promptly when received
- Advise the volunteer of any queries / problems with the claim form promptly
- Monitor expenses to ensure they stay within HMRC guidance

The director of marketing, membership and income growth is responsible for the maintenance, regular review and updating of this policy, in collaboration with the finance team.

4. Reimbursement

Reimbursement of volunteer expenses will usually be made directly into the volunteer's nominated bank account by BACS transfer. This is the WEA's preferred method of payment as it is more secure and faster than payment by cheque. A section for volunteers to provide the WEA with their bank details for this purpose is included on the volunteer expenses claim form. Where bank details are not provided, reimbursements will be paid by cheque. In some instances for certain projects, project volunteers can seek reimbursement of their claim directly from the region through petty cash, up to a value of £50.00. These claims should still be made on the volunteer expenses claim form and in line with this policy.

Payment remittance advices will be sent to volunteers advising that payment has been made. These will be sent by email wherever possible in line with WEA's sustainability objectives.

5. Receipts and other supporting documentation

All expenses other than mileage should be claimed with supporting receipts, tickets or invoices attached.

Where receipts have been lost, or have not been obtainable, a missing receipt declaration form should be completed and sent with the relevant claim, stating the reason the receipt(s) is missing. In line with the WEA financial regulations and policies, a maximum of 3 missing receipt declarations is allowed in any financial year. Credit card vouchers / bank statements are not acceptable, but may support a missing receipt declaration.

6 Travel

This section covers expenses incurred travelling on WEA business

6.1 Public transport

Where public transport is available and is practical, volunteers should make every effort to make use of it to improve the environmental and economic impact of business related travel

6.2 Trains

Train journey bookings should be made for the cheapest available fare and the limit claimable for any train journey will be the standard class fare. The WEA has a national account with Click Travel, so please liaise with your usual WEA staff member in advance of any journey requirements you may have which you would like to be booked on your behalf.

6.3 Rail discount cards

Volunteers that travel by train on WEA business and who are eligible to obtain and use rail discount cards are encouraged to do so. Where the primary use of the rail card is for WEA business travel and using it for this purpose will achieve cost savings in excess of the cost of the rail card purchase, the WEA will reimburse the cost of the rail card. Details of the rail card will be required at the time of making the booking and the card has to be available to show rail staff during the journey. More information regarding rail cards is available in the rail card information for volunteers appendix 1.

6.4 Air and international travel

All air travel should be pre-authorized by the appropriate senior manager, and international travel is only allowed on the authority of the Chief Executive / General Secretary. The appropriate senior manager will set the arrangements for allowable expenses for international trips, however arrangements should not run counter to this policy and in most cases, adjustment of the maximum daily limits should suffice to take into account local circumstances.

6.5 Mileage

The standard mileage rate will usually be the maximum rate allowed by HM Revenue and Customs (HMRC) without attracting taxation. The current mileage rate for volunteers and staff is 45p/mile. An additional 5p/mile is payable where a lift is provided to another WEA staff member or volunteer travelling on WEA business.

6.6 Parking charges and road tolls

Where public transport is not feasible on business travel, parking charges should be considered part of the economic cost of choosing to use a car. Road tolls unavoidably incurred as part of a journey whilst on WEA business will be reimbursed on production of the accompanying toll ticket with the expenses claim form.

6.7 Fines

Parking fines and speed tickets cannot be claimed and are non-reimbursable.

6.8 Taxis

Taxis should not normally be used except where one or more of the following conditions exist:-

- The use of a taxi is required because of permanent or temporary disability
- There is a risk to staff or volunteer due to location and/or time of day
- The taxi is carrying other passenger(s) also travelling on WEA business and it is cheaper than the equivalent standard public transport cost
- There is equipment or materials which needs transported
- The time incurred in taking public transport would make a journey by taxi more economic or reasonable

6.9 Hire cars

There may be occasions where a hire car is necessary or deemed a cheaper alternative to train journeys, for example in instances where a number of volunteers are travelling on WEA business from and to the same location. Car or any other transport hire should be pre-authorised by the appropriate senior manager. In most circumstances any such hire will be organised directly by the WEA.

6.10 Oyster cards

Generally, reimbursement for oyster card usage will be for actual costs*. These should be reclaimed and supported by the printed oyster card usage statement (this can be obtained from the station counter upon request or from the individual's online oyster card account, if registered online).

*For WEA volunteers that live and work outside of London but have to travel frequently to London on WEA business, and this is their only use of the card, the purchase of an oyster card and top ups will be reimbursed in full where claims are submitted along with the accompanying oyster card statement(s).

7. Subsistence and accommodation

7.1 Subsistence

Subsistence rates for volunteers are the same as for core staff. The allowable upper limits claimable for different types of subsistence will be reviewed annually as part of the whole policy review.

- Reimbursement of subsistence will be for actual costs up to the value of the upper limit allowable
- Meals cannot be claimed where they have been otherwise provided by the WEA e.g. lunch at meetings and/or dinner and/or breakfast with accommodation
- Overnight accommodation must be pre-authorised by the appropriate senior manager, and in most circumstances this will be booked directly by the WEA
- The maximum daily limit applies per individual
- Purchases made for alcohol will not be reimbursed

The upper daily limits for subsistence and accommodation can be found at point 9 below.

7.2 Accommodation

The WEA has a national account with Click Travel and this should be used for overnight hotel accommodation wherever possible. In most circumstances, the WEA will make any bookings

directly. All accommodation must be pre-authorized by the appropriate senior manager. Where a non-commercial arrangement, such as staying with a relative or friend, is available and saves the WEA money, this should be pre-authorized by the appropriate manager and will be reimbursed in line with the information at point 9 below.

7.3 Paying for others

Volunteers are allowed to pay for and reclaim expenditure relating to other individuals as long as those individuals are WEA staff or volunteers and would be entitled to make a claim themselves. In these circumstances, the name(s) of the person(s) for whom the claim relates must be detailed on the expenses claim form.

8. Other categories of expenses

8.1 Telephone, postage and other minor sundry items

Where a home/private landline or mobile telephone is used for occasional WEA business, the actual charges can be reclaimed. A copy of the telephone bill with the relevant WEA calls and costs highlighted should be provided with the expenses claim form. Where call charges form part of a bundle contract and have not resulted in separate/additional call charges, no cost can be claimed from the WEA. Where additional call charges have been billed, additional charges outside of bundle deals are usually itemised on the bill and as such, the copy bill with the relevant WEA business calls highlighted should be submitted with the expenses claim form.

Similarly, any minor sundry costs incurred in carrying out WEA business can be reclaimed, for example postage costs, where these are supported by receipts showing the actual cost(s).

9. Maximum allowable daily limits for subsistence and accommodation

| Type | Notes | Max. daily limit | Receipt required? | Taxable? |
|------------------|--|-----------------------------|-------------------|----------|
| Hotel / B&B* | Requires pre-authorization from appropriate manager | £85.00 (£110 for London) | Yes | No |
| Other accom. | As above and seek advice from the finance team as there will be an arising tax liability | £25.00 | No | Yes |
| Breakfast (a) | Where there is no overnight stay and activity giving rise to expense encompasses normal breakfast time | £6.00 | Yes | No |
| Breakfast (b) | Where there is an overnight stay and breakfast isn't provided as part of booking | £9.00** | Yes | No |
| Lunch + beverage | Unless lunch is otherwise provided | £8.00 | Yes | No |

| | | | | |
|-------------------|--|----------|-----|----|
| Dinner + beverage | Where there is an overnight stay and dinner hasn't been otherwise provided, or | £18.00** | Yes | No |
|-------------------|--|----------|-----|----|

| | | | | |
|--------------|---|-------|-----|----|
| | Where activity giving rise to expense will result in an arrival home after 8.00pm | | | |
| Refreshments | e.g. beverage on journey | £5.00 | Yes | No |

*Hotel/B&B accommodation amounts higher than this may be approved in very exceptional / emergency situations and this must always be with prior approval from the appropriate senior manager and evidence of approval sent with the corresponding expenses claim form.

**or the equivalent combined value where an evening meal forms part of a meal deal, i.e. to include breakfast and an evening meal

Note: Alcohol purchases will not be reimbursed by the WEA. The exception is where a meal deal is purchased which includes an alcoholic beverage, subject to the £ values described above.

10. General

This document should be read in conjunction with the WEA volunteer policy. Further explanations and information is available from the volunteering team, contactable at volunteering@wea.org.uk, and from the volunteering section of the WEA intranet - <https://intranet.wea.org.uk/volunteers/volunteer-policies> .

Further information is also provided in the WEA financial regulations which are available on the intranet – <https://intranet.wea.org.uk/finance-and-business-planning/welcome-finance-policies>.



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Appendix 2

WEA volunteer code of conduct

Introduction - The WEA welcomes and values the contribution of members and volunteers who enhance the learning experience of our students. The WEA wants volunteers to have a positive experience in a supportive environment. This volunteer code of conduct is intended to establish such an environment and to help prevent or deal speedily with issues should they arise. Please be assured, we have your best interests at heart!

Guidance - WEA members and volunteers are subject to the WEA governing documents, which are the WEA articles of association and WEA regulations including financial regulations. As with staff, the WEA expects a certain level of conduct from volunteers as laid out in the guidance below:-

1. Please be reliable, honest and mindful, upholding the WEA's values and safeguarding its reputation and assets at all times (Regulation 2.3) by acting in the WEA's best interests inside and outside the organisation:-

- Avoid inflammatory or offensive comments about individuals or organisations including the WEA – this especially applies when using social media and websites whether for the WEA or privately
- Ensure you are aware of your responsibilities within WEA regulations, particularly around finance - if in doubt seek advice from WEA staff
- Please avoid participation in activities which could damage WEA's reputation and public standing, for example:-
 - Political activities when 'acting' on behalf of the WEA, including communicating opinions to MPs/MSPs or other organisations and when using the WEA logo or resources – adhere to guidance provided by the WEA nationally
 - Activities which may be against the law, resulting in conviction or caution
 - Membership of organisations whose ethos is considered contrary to that of the WEA
 - Visiting inappropriate websites and/or sharing offensive material or personal images

2. Carry out your volunteer role to the best of your ability, aiming to meet mutually agreed time commitments and standards as determined by your designated member of staff:-

- Co-operate with and follow all reasonable instructions which apply to you
- Keep in contact as agreed with your designated member of WEA staff, letting them know in good time (at least 24 hours) if you are unable to carry out your volunteer role
- Keep your designated member of WEA staff informed of any changes in address / next of kin or other personal details
- Disruption of the work of WEA staff or other WEA members and volunteers should not occur
- Reporting for, or carrying out your volunteer role under the influence of alcohol, or other recreational drugs or substances is not acceptable

3. Have respect for others, treating everyone you meet with courtesy and respect at all times. WEA has a zero tolerance policy where instances of unacceptable behaviour occurs:-

- So that we can all work together for the benefit of the organisation, respect the roles of WEA staff, as they respect your role and duties
- Express your views openly, but courteously and respectfully in all your dealings, including within and outside of meetings
- It is never acceptable to take part in any form of physical violence, bullying or harassment
- Avoid the use of abusive and offensive language, verbal or written
- The WEA has an equality & diversity policy please ensure your behaviour accords with this

4. At all times respect confidentiality, by protecting WEA information, records or data you use in your volunteer role, even after your volunteering role has come to an end:-

- Please do not disclose information that is confidential about the WEA, its staff, students or other members and volunteers except where there is a safeguarding or 'Prevent' issue, or where there is an issue provided for in the WEA whistle-blowers' policy or the Public Interest Disclosure Act. If in doubt seek advice and guidance
- Remember the WEA is governed by the principles enshrined in the 2018 General Data Protection Regulations (GDPR)

5. Comply with all arrangements to ensure the health, safety, welfare and security of WEA staff, students, members and volunteers, premises and property:-

- Report any loss or damage to WEA property to your designated member of WEA staff
- Please don't remove or attempt to remove any items of WEA property, without permission from your designated member of WEA staff
- Don't wilfully commit or attempt to commit an act which may endanger people or property or which breaches safety rules, WEA policy or legislation

6. Seek to understand and comply with WEA regulations and policies in all aspects when carrying out your volunteer role (whether in WEA premises or other places), in relation to WEA staff, students and other members and volunteers - seek advice from your designated member of WEA staff:-

Relevant WEA policies to be aware of are – volunteer policy; volunteer expenses policy; financial regulations; branch financial regulations; health & safety policy; safeguarding policy and the Prevent Duty; sexual harassment policy; general data protection regulation (GDPR) policies; equality and diversity policy; computer use policy; fraud, bribery and corruption policy.

7. Protect yourself from conflict of interest by not taking part in activities which may result in a conflict of interest, seek advice from your designated member of WEA staff:-

- Understand and comply with the WEA Earnings Limit for Volunteers
- It is essential you declare any interests outside of the WEA that may conflict with those of the WEA
- The use of WEA equipment or materials, or other resources on WEA premises, is for stated purposes, please do not use for any purpose other than that intended and authorised by the WEA
- Do not enter into any contract on behalf of the WEA without permission
- It breaches your involvement with the WEA to falsify documents, contracts, records, or expenses or defraud or attempt to defraud the WEA

- Your position is privileged, so please do not engage with the WEA for any kind of private benefit (including financial) to you or others, this includes soliciting or accepting gifts which might be considered a bribe
- Make sure you pass on all donations given for the WEA, to your designated member of WEA staff for recording purposes
- You must not accept money or gifts for your personal use
- Seek permission if you want to use the WEA's name for events (including fundraising events)
- You should not use the WEA name or logo to start companies, unless this has been authorised by a designated member of the WEA Staff

Date

Volunteer Signature

Full Name (printed)

Counter signed

Full Name (printed)