

# Volunteer Policy

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31 March 2026

Next review  
31 March 2027

Policy owner  
Board of Trustees

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## 1. Our commitment to volunteers

Volunteers give their time, skills and experience to Roots for Change UK CIO, registered charity 1209308. We will give them clear roles, fair treatment, appropriate support and safe conditions. This policy applies to volunteers, the Volunteer Coordinator, activity leaders and trustees who supervise volunteers, both in the UK and through partner programmes.

Volunteering is a choice. It carries no promise of wages or guaranteed work and no obligation to accept assignments. Agree availability with each volunteer without imposing employment-style minimum hours or penalties for leaving. The arrangement must reflect genuine volunteering in practice. Seek advice before offering payments or benefits, or changing arrangements in a way that could affect employment or tax status. This policy does not remove any legal rights or protections.

This policy works alongside the Code of Conduct, Safeguarding and Child Protection Policy, Safeguarding Adults Policy, Complaints Policy and Privacy Notice and Data Protection Policy. The expenses procedure below is for volunteers; trustee claims follow the Trustee Expenses Policy.

## 2. Recruitment and inclusion

The Board must appoint a suitable person to coordinate volunteers and make sure each volunteer has a named supervisor and alternative contact before starting. Record names, contact details and availability in Annex A. A placement must not begin without the necessary supervision and induction.

Give applicants a clear role description and use fair, consistent selection criteria suited to the role. Explain the tasks, location, expected availability, boundaries, support, expenses and risks. Discuss accessibility and communication needs and make reasonable adjustments as part of our commitment to inclusion. Do not discriminate or make assumptions about someone's ability because of disability, age, language or background.

Check identity, relevant references, experience and gaps in a way that is proportionate to the role. Collect only the information needed to assess suitability, explain how it will be used and protect it. Explain any DBS requirement before the person applies. Ask only for criminal-record information that can lawfully be disclosed; do not require protected or filtered information. Assess disclosures fairly, considering relevance to the role, seriousness, time elapsed, current legal restrictions and safeguarding risk. Discuss concerns with the applicant and record the reasons for the decision. Reject an applicant on this basis only where the law or assessed risk requires it. Give applicants access to these recruitment rules.

For a volunteer under 18, follow the Safeguarding and Child Protection Policy, agree suitable tasks and supervision, involve parents or carers appropriately and obtain any required permissions. A young volunteer cannot act as an adult supervisor or count towards an adult staffing ratio. Check

legal restrictions and competence before assigning driving, cash handling, hazardous work, personal care or other specialist tasks.

### 3. Safeguarding and DBS checks

Assess eligibility for Disclosure and Barring Service (DBS) checks against the actual role. Record the activities, frequency, workforce, lawful check level and any barred-list eligibility. Obtain the appropriate check, assess suitability and record authorisation before duties begin. Do not request a standard, enhanced or barred-list check for an ineligible role. DBS checks are unavailable for people under 16. References, supervision and attention to ongoing conduct remain necessary even when a certificate is clear.

Since 1 September 2026, supervision no longer removes affected work with children from regulated activity where the statutory activity and frequency or overnight conditions are met. Review supervised tutoring, coaching, caring and similar roles against current DBS guidance and complete the necessary checks. This change does not alter the definition of regulated activity with adults.

A barred person must not carry out the relevant regulated activity. Required checks and the suitability decision must be complete before regulated duties begin. Obtain lawful overseas checks and references where relevant and record any gaps in coverage. Review the assessment whenever the role, delivery arrangements or relevant suitability information changes.

Follow the Safeguarding and Child Protection Policy or Safeguarding Adults Policy immediately when a concern arises. Continue dealing with the concern if the person leaves. Where the charity is a regulated activity provider and the statutory conditions are met, make a DBS referral, including where permission would have been withdrawn had the person not resigned or left first. Record the decision and coordinate any other required notifications.

### 4. Induction, safety and support

Complete Annex A before the volunteer begins their duties. Explain the charity's purpose, role boundaries, supervisor, safeguarding contacts, complaints, confidentiality, information systems, expenses, health and safety, first aid and emergencies. Check understanding and record training for the role. Provide the equipment and instruction needed. Volunteers must not work unsupervised beyond their competence or authority.

Assess the risks of the placement, including any lone working, home visits, transport, distribution, cash handling, digital contact or overseas activity. Confirm that insurance covers the people and activities involved. Work must not start without essential safety arrangements, qualified help or required cover.

Volunteers must follow the Code of Conduct, keep professional boundaries and respect participants' dignity. Use only authorised systems and accounts. Do not form inappropriate private relationships with people receiving help, share their images without permission or use charity resources for personal benefit. Specialist care, medication and other regulated tasks require the specific lawful arrangements and training before they can be undertaken.

The supervisor must check in after the first session and agree further reviews suited to the role, at least every three months while the placement is active. Discuss support, workload, accessibility, boundaries, training and concerns. Refresh safeguarding learning at least annually and after relevant changes.

Volunteers may decline an assignment, raise a safety concern or stop an unsafe task. Tell the supervisor promptly so that a safe handover or replacement can be arranged. The coordinator must

support volunteers experiencing bullying, harassment or distress and ensure safeguarding concerns reach someone able to act independently.

## 5. Expenses and payments

We reimburse reasonable and necessary out-of-pocket costs for agreed volunteering activities, supported by evidence and within an authorised budget. Explain likely costs and agree approval before the volunteer spends money. Discuss accessible travel and other participation support in advance so that difficulty paying does not unnecessarily prevent someone from volunteering.

Eligible costs may include necessary public transport, fuel or electric charging for an approved journey, parking or tolls, modest subsistence during agreed duties, required supplies or training, and approved accessibility or caring costs needed for the placement. Reimburse actual costs. For private-vehicle journeys, record the approved route, distance, receipts and a reasonable calculation of the fuel or charging used. This policy does not provide a flat mileage payment. Private spending, fines, luxury upgrades, lost earnings and costs reimbursed elsewhere are not eligible.

Use Annex B and normally submit claims within 30 calendar days. Consider reasonable explanations for late claims. If a receipt is missing, record the item, amount, explanation and alternative evidence for independent approval. In an emergency, approval may be given after the event, but no one may approve their own claim or claim private costs. Record who authorises any advance, reconcile it against evidence and return unused money.

The supervisor or coordinator checks the purpose and evidence and may approve a claim only within their documented delegated authority. If that authority is insufficient, trustees without a conflict of interest must approve it under the current constitution. No one may approve or release their own payment. Refer claims involving a connected person to decision-makers without a conflict. Follow Annex C of the Fundraising Policy for independent approval, verification of the recipient and duplicate-payment checks.

Review the claim or ask for missing information within 10 working days. Pay a complete, authorised claim within 20 working days of receiving the complete claim. Explain any delay and give a revised payment date. Seek advice on tax and employment status before offering flat payments or benefits instead of genuine expenses. Volunteers may query an expenses decision through the Complaints Policy.

## 6. Raising concerns and resolving difficulties

Speak to the supervisor about ordinary difficulties, then the coordinator or a trustee without a conflict of interest if the issue remains unresolved or involves that person. The charity's general telephone number is +44 7960 287537 and its email is [info@rootsforchangeuk.com](mailto:info@rootsforchangeuk.com). For sensitive matters, ask for a confidential callback and give a safe way to contact you. Do not send allegations or personal case records to the general inbox. You can also write to Roots for Change UK CIO, Bargain Outlet, 111-113 King Street, South Shields, Tyne and Wear NE33 1DP.

Follow the Complaints Policy for a formal complaint, independent review and response times. Arrange interpretation, accessible communication or a support person where appropriate. Protect anyone raising a genuine concern from retaliation. Keep information confidential to those who need it, without promising secrecy.

Report safeguarding concerns immediately to the Designated Safeguarding Lead (DSL) on +44 7960 287537. If the DSL is unavailable or implicated, contact the person providing cover, a trustee without a conflict of interest or the appropriate statutory authority. In a UK emergency, call 999. Other statutory contacts are in Annex A of the Safeguarding and Child Protection Policy and Annex A of the

Safeguarding Adults Policy. Do not delay protective action while waiting for a manager, complaint outcome or staff or volunteer process.

When concerns are raised about a volunteer's conduct, explain the issue and give them a fair opportunity to respond where this is safe and consistent with statutory advice. Consider support or retraining and record the decision. Serious risk may require an immediate pause or restriction of duties, which must be reviewed promptly. This protective step does not establish wrongdoing. A volunteer may ask a trustee without a conflict of interest to review the decision through the Complaints Policy.

## **7. Ending a placement**

Either the volunteer or the charity may end the arrangement. Encourage reasonable notice where possible so a safe handover can be arranged, without a penalty or requirement to continue volunteering. The charity may pause or end a placement for safety, conduct or operational reasons and should explain and record its decision fairly.

Complete Annex C. Collect keys, badges, equipment and records, remove access promptly at the appropriate end time, settle expenses and arrange a safe handover. Do not promise a particular reference, destroy incident evidence or agree to secrecy that would prevent lawful reporting. Continue any necessary safeguarding, police, local authority designated officer (LADO), DBS or regulatory action after departure.

Keep volunteer information secure and limit access according to people's roles. Collect only necessary medical, emergency and criminal-record information, and keep safeguarding allegations in a separate restricted case file. Follow Annex D and Annex A of the Privacy Notice and Data Protection Policy. Volunteers must return charity information and continue to respect confidentiality after their role ends.

## **8. Learning and review**

The coordinator reports to trustees on recruitment, supervision, training, volunteer feedback, accessibility, expenses and unresolved safety issues. Learn from incidents and complaints, identify recurring problems and assign improvements to named people with deadlines. Check partner arrangements and local requirements before international placements.

Policy date: 31 March 2026. Next scheduled review: 31 March 2027. Review sooner after a legal change, serious incident or substantial change in services. Trustees must record approval of substantive revisions, give volunteers the current policy and make sure everyone can use the reporting routes.

## Annex D - Volunteer record retention schedule

Follow this schedule alongside Annex A of the Privacy Notice and Data Protection Policy. Keep any record needed for a justified complaint, claim, safeguarding matter or legal or regulatory hold beyond its normal disposal date. Record the reason, restrict access and review the hold.

| Record                               | Rule and responsibility                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Unsuccessful application             | Coordinator deletes after six months from the decision, unless a documented complaint/claim or another lawful need requires longer. Do not keep for future roles without an appropriate agreed basis.                                                                                                                                               |
| Core placement record                | Keep necessary role/dates, induction/training, authorisation and decision evidence for six years after the placement ends; remove unnecessary contact, health and other sensitive detail sooner. Coordinator reviews at exit; do not retain the entire application indiscriminately.                                                                |
| Emergency and adjustment information | Remove once no longer needed, normally within three months of the last relevant activity; retain only necessary incident evidence separately under the safeguarding or claims rules.                                                                                                                                                                |
| DBS certificate or copy              | Destroy certificates and copies when no longer needed for the recruitment decision and any justified review, normally within six months of the decision. Record the reason for any exceptional longer retention. Keep only the minimal permitted check date, type, reference, role and decision with the core record, without certificate contents. |
| Expense/payment evidence             | Finance retains necessary evidence for six years after the relevant financial year, subject to applicable legal, tax, grant or claim requirements and a documented longer hold.                                                                                                                                                                     |
| Safeguarding allegations             | Keep separately under Annex D of the Safeguarding and Child Protection Policy or Safeguarding Adults Policy. Use a case-specific retention decision and review within 12 months; do not delete automatically on departure or after six years.                                                                                                       |
| Disposal                             | Authorised owner confirms no hold applies, securely deletes/shreds and logs category/date/authority without preserving deleted sensitive information; include copies and backups in the deletion process.                                                                                                                                           |