

Volunteer Handbook

Everything you need to know about volunteering with
Healthwatch Westminster



Volunteer Handbook	3
About Healthwatch.....	4
What services do we cover?	4
What powers do we have?	5
What do we do?	6
How do we work?.....	7
Our Volunteers	8
Volunteer roles.....	8
Our commitment to you	9
How we will support you.....	9
What we expect from you	10
Essential policies and procedures	11

Volunteer Handbook

We are delighted that you have chosen to volunteer with Healthwatch Westminster . We depend on volunteers like you to ensure the voice of those living and working in Westminster can be heard. People’s experiences are at the heart of all we do, and it is people like you who choose to volunteer that make such a difference and help us achieve the biggest impact in our work.

This handbook is a useful reference tool, so please take the time to read it and keep it in a safe place so you can refer to it in future. It gives you background to who we are and what we do, an understanding of the roles and responsibilities of our volunteers and a summary of our policies and procedures that we have in place to support and protect you.

Our **Volunteer Policy** together with the other policies and procedures referred to in this handbook, ensures we maintain the highest possible standards, meet our legal responsibilities and ensure we provide a consistently high level of support to those in our communities who use health and social care services now and in the future.

We are looking forward to having you join us!



Cleo Chalk

Healthwatch Service Manager



About Healthwatch

We are the independent champion for people who use health and social care services. We're here to find out what matters to people and help make sure their views shape the support they need.

The Health and Social Care Act 2012 requires a local Healthwatch in every local authority area of England, to give individuals and communities a stronger voice to influence and challenge how health and social care services are provided in their area.

Nationally and locally, we have the power to make sure that those in charge of health and social care services hear people's voices. As well as seeking the public's views ourselves, we also encourage health and social care services to involve people in decisions that affect them. People's views come first – especially those who find it hardest to be heard.

We champion what matters to people living and working in Westminster and work with others to find ideas that work. We are independent and committed to making the biggest difference.

Healthwatch England: All local Healthwatch are linked to a national body called Healthwatch England. You can find out more about Healthwatch England here: www.healthwatch.co.uk.

What services do we cover?

- All hospital-based health services for adults and children.
- All community-based health services for adults and children including GPs, dentists, pharmacists, podiatrists, health visitors, district nurses, physiotherapists, occupational therapists, speech and language therapists and community psychiatric services.
- Residential and nursing home services for adults.
- Social work and/or care services including home helps, home carers, support workers and social workers or care managers.
- Services that combine health and social care including sexual health centres, wellbeing centres and day centres for older people.
- Services and support for children and young people apart from those who are in receipt of social care support from the local Council.



What powers do we have?

We are independent of central and local government with our own legal powers and set our own work plan to reflect the concerns of the local community. We are unique in having some statutory powers and duties whilst retaining our independence.

We can:

- Enter and view premises where health and/or social care services are provided. (This power does not extend to premises that provide social care to children but Healthwatch is expected to gather the views and experiences from children and young people in collaboration with local partners.)
- Refer issues of concern direct to our local Council Health Overview and Scrutiny Committee.
- Have a seat on our local Health and Wellbeing Board.
- Escalate issues direct to Healthwatch England and the Care Quality Commission (CQC).
- Service providers and commissioners have a duty to respond to local Healthwatch reports and recommendations within 20 working days. (This includes providers of children's social care services.)

We also have a duty to provide information to the public about health and social care services and service providers. You can find out more about [Healthwatch legal powers here](#).

What do we do?

There are three key aspects to our work:

Voice	Ensuring local people's voices are heard and their experiences can influence the design, commissioning and delivery of local health and social care services.
Scrutiny and accountability	Holding those who plan and commission local services to account through our involvement in the Health and Wellbeing Board, our reports and recommendations, our power to enter and view services and our ability to refer issues of major concern direct to Healthwatch England or the local Health Scrutiny committee.
Information and signposting	Providing an Information and Signposting service to provide information about local health and social care services to help people make informed choices about what's best for them. Also providing information and signposting to people wishing to complain about health and care services. Note: Healthwatch does not investigate individual complaints or act on behalf of individuals with complaints services

How do we work?

We believe that Healthwatch can only be truly effective if we can reach as many people as possible, so we work with established networks, groups and organisations in Brent.

Our approach to being effective is underpinned by creating a 'network of networks' which:

- Builds strong links with local voluntary and community groups.
- Uses established community networks to share information, and to find out what matters to people.
- Works collaboratively with local partners who have strong local knowledge and connectivity with communities of interest and can support our work in obtaining the views of these communities.
- Builds a bank of trained volunteers who can be the eyes and ears of Healthwatch at grass-roots level.
- Champions the voices of those who are seldom-heard.

Our Advisory Group

Our Advisory Group is responsible for setting our work plan each year based on local public feedback. They act in accordance with a decision-making process which is outlined in our [Prioritisation Process](#).

Our Staff

As part of your induction you will meet our team and we will help you understand how we all work together.

Healthwatch Westminster Staff Team

Blessing Ogunoshun, Healthwatch Manager

Ruth Daniel, Engagement and Volunteer Coordinator

Gio Pascarella, Engagement & Communications Coordinator

Maria Ghaly, Administration and Communications Support Officer

Sajil Shahid, Insights and Outcomes Analyst

Cleo Chalk, Healthwatch Service Manager

Our Volunteers



There are thousands of volunteers across Healthwatch nationally. Volunteers get involved for a variety of reasons. Some want to make a positive difference to the lives of people, others want to develop new skills and some simply want to meet new people and have fun.

Volunteer roles

At Healthwatch Westminster we have a variety of volunteer roles, including:

- Patient Experience – collecting feedback about people’s experiences of health and social care services.
- Information and Signposting Volunteer – helping people get the information they need about health and care services and how to access community support.
- Enter and View volunteer – Enter & View visits are a core Healthwatch activity. Our teams visit health and social care facilities, like hospitals and care homes to gather the views of staff, residents, patients, and families.
- Engagement – engaging with local residents to promote Healthwatch Westminster and to gather views and experiences of health and social care.

Please note as a volunteer you may wish to undertake several roles or you may choose only to carry out certain roles and/or specialise areas where you have specific skills or have special interest. We will discuss and agree the time you spend volunteering at Healthwatch. See our full [Volunteer Role Descriptions](#)

Our commitment to you

We have a dedicated Volunteer Coordinator who will support and guide you in your volunteering role with us.

We want to make sure that you enjoy your role and get the most out of it, and we make a commitment to our volunteers.

We will:

- Always treat you with respect, consideration and appreciation.
- Ensure you have a clear idea of your responsibilities whilst volunteering. You will be properly inducted into your role.
- Give you information about the training and support available to help you carry out your role. We will never expect you to complete a task you are not comfortable with.
- Provide you with support through regular meetings or discussions, appropriate to your individual needs, abilities and skills.
- Offer you fair, honest and timely feedback on your contribution.
- Update you on how your contribution has made a difference.

How we will support you

Induction

Your Volunteer Officer will introduce you to the Healthwatch staff and volunteers you will be volunteering with. They will also provide more detail about the sections in this handbook. Please use this opportunity to ask any questions and highlight any areas where you would like further training and support.

If you will be volunteering with us over a significant period of time, you will undergo a trial period which gives us both a chance to assess how things are working out.

Training

We want to ensure that you feel happy and confident to carry out your role. As a Healthwatch volunteer you will be offered training and your Volunteer Officer will try to source specific training you have identified, that will help you do this.

Support

As part of your development, please make a note of how each task you carried out went, what you did, what you enjoyed and if there were any issues that arose.

Each volunteer will have a review meeting and the frequency of these will vary depending on the nature of your role and your time commitment. The 1-2-1 meeting, in person or by phone, will focus on how the role is going, what support you need and update you on what's happening at Healthwatch Westminster. It is an opportunity for volunteers and staff to raise issues and for you to talk constructively about your involvement with us.

What we expect from you

Healthwatch Westminster expects high standards from all our volunteers. To ensure you get the most out of your role, volunteers will:

- Always treat Healthwatch Westminster volunteers, staff and supporters with respect, consideration and appreciation.
- Act in a professional way whenever you represent Healthwatch Westminster in public.
- Act in a way that doesn't discriminate against or exclude anyone.
- Provide as much notice as possible if you are unable to fulfil your volunteering commitment, or if you no longer wish to volunteer.
- Ask your Engagement & Volunteer Coordinator if you don't fully understand your role and responsibilities or need any other guidance.

Reliability and Commitment

It's very important that you're reliable and you stick to any arrangements you've made with us. If your circumstances change, please tell your Volunteer Officer as soon as possible. If you're planning to go on holiday, please let your Engagement & Volunteer Coordinator know that you'll be unavailable for certain dates and when you plan to return.

Essential policies and procedures

As a volunteer, you'll need to be aware of the following policies and procedures. Please take a few minutes to have a read through and familiarise yourself with them.

Expenses

We want to make sure that volunteers are not out of pocket or financially worse off as a result of their involvement in volunteer activities. We will reimburse volunteers for any reasonable out-of-pocket expenses incurred whilst volunteering with us.

Volunteers are required to complete expenses forms each month; these are available electronically or in hard copy and must be submitted by Tuesday of each week.

Discuss with your Volunteer Coordinator what you can claim for public transport or using your own car and the importance of keeping receipts and records of where you have been. If volunteering for three hours or more in one session, you may be able to claim for refreshments.

Expenses will be paid directly into your bank account. Read our [Appendix 1. Volunteer Expenses Policy](#) For full details.

Travelling by car

It's important to note that if you're involved in an activity for Healthwatch Westminster that involves using your car, even travelling to and from a venue, you must inform your own car insurance company.

Most insurance companies agree to cover car journeys for volunteers at no extra charge. We require all volunteers to check this with your own insurance company. Your car insurance will **not** be covered by Healthwatch Westminster.

Code of conduct

- **Gifts:** Giving or receiving gifts may give the impression of favouritism and could raise expectations of the level of support you can provide in your role. As such, we ask that volunteers don't give or receive personal gifts to or from staff or anyone receiving support services from Healthwatch Westminster. However due to certain situations you may find that you are not in a position to decline the gift

being offered. If this is the case please refer to **Appendix 5. The Gifts and Hospitality.**

- **How we talk:** When you're volunteering for Healthwatch Westminster you may notice that we use a certain style of language. The way we talk is important and our 'voice' is a key part of helping people understand who we are and what we do. It's essential that we maintain one voice that's consistent, clear and easy to understand. Whether you're speaking on behalf of Healthwatch Westminster, drafting an email or writing a letter, it's well worth getting to grips with the Healthwatch 'tone of voice'. Your Volunteer Officer will help you with this. Read our **Appendix 6. Code of Conduct Policy** for further details.
- **What we wear:** As a volunteer for Healthwatch Westminster, you're also an ambassador for the organisation. You're responsible for presenting a positive image to visitors, clients and the community.

Please use your judgement to dress appropriately for the activities you're asked to carry out. If you're ever unsure about what to wear, just ask your Volunteer Coordinator.

Conflicts of interest

We realise that volunteers may sometimes know Healthwatch Westminster stakeholders in a personal capacity – as friends, family or colleagues.

As an organisation which represents the public, it is vital that we remain impartial and transparent and declare any conflicts we may know of. Please complete **Appendix 3. Declaration of Interest** which you should give to your Volunteer Officer.

Health and safety

Healthwatch Westminster is committed to looking after the health, safety and wellbeing of everyone who works and volunteers for us. Any activities carried out on a voluntary basis are covered by health and safety legislative requirements. It's important that you understand and accept your personal responsibility towards promoting and maintaining health and safety standards in order to provide a safe environment for all.

It's important that you:

- Carry out your duties without endangering either your own health and safety, or that of other volunteers, Healthwatch staff, third parties and/or the general public.

- Comply with all relevant instructions and procedures relating to safety and follow guidance provided by Healthwatch Westminster.
- Inform your Volunteer Officer of any personal health and safety requirements that you have.

Healthwatch Westminster will carry out risk assessments on activities you do and venues you visit where necessary and will share with you the outcomes of those assessments, to ensure you know what you can do to keep yourself safe whilst volunteering for us.

Our Health, Safety & Wellbeing handbook provides full details: a copy will be provided as part of your induction.

Working alone

Whilst it is unlikely that volunteers will be asked to meet individuals on a one to one basis in the course of their volunteer work, where this does occur, volunteers must ensure that their Volunteer Support or the Lead Officer has authorised the meeting and Healthwatch office staff have been informed of the details of the meeting date, time and the location.

A risk assessment must be carried out prior to a one to one meeting to agree for example, a public venue, action to take in the event of a medical emergency or violent behaviour and take confidentiality and privacy into consideration.

Volunteers must not undertake home visits unless accompanied by a Healthwatch staff member.

Regular telephone contact between the volunteer and their Volunteer Coordinator or the Healthwatch office should be arranged in advance.

Volunteers should also leave details of where they will be with their family in case of emergency.

Should a volunteer be in a lone working situation when an incident or accident occur, they should report this to their Volunteer Officer or the Healthwatch staff team at the office as soon as possible and will be asked to complete an incident or accident reporting form afterwards.

In the event of fire at a venue, then all venue procedures must be adhered to. The Healthwatch office should be informed of any fire incidents through the incident reporting procedure above.

Accidents, incidents and insurance

All accidents and incidents must be reported to your Volunteer Officer as soon as possible. If you feel that it's a real emergency, please contact the emergency services immediately. You are covered by our 'Employers Liability Insurance' and our 'Public Liability and Professional Indemnity Insurance' when carrying out your volunteering role on our behalf.

Personal safety and ID badges

You will have provided us with an emergency contact, who we will contact in the unlikely event of an emergency, please fill in **Appendix 2. Emergency Contact details** and hand this to your Volunteer Coordinator. If it is required for your role, you'll be issued with a volunteer ID badge which you should always have with you when carrying out your activities. ID badges must be returned to Healthwatch Westminster when you stop volunteering.

Clear boundaries are important for volunteers and staff. They enable us to carry out a service according to agreed expectations and ensure that everyone receives the same quality of service.

Please refuse politely if a service user asked for your personal contact details. You may feel it would be alright for someone to phone you if they are in trouble or to pass information on to you at a later stage, but it is putting yourself at risk from intrusion and potentially creating dependency. It is natural to want to help someone in need, but our aim is to encourage independence, and our signposting function will be able to support in this respect.

Safeguarding

All Healthwatch Westminster volunteers are required to undergo safeguarding training as part of their induction process. This will equip you with the safeguarding skills to act appropriately and confidently to protect the children and vulnerable adults you may come into contact with.

If your role involves engaging with members of the public, you will be required to undergo a Disclosure and Barring Service (DBS) check as part of our policy on safeguarding. We follow the safeguarding policies of our host organisation, The Advocacy Project. These can be viewed [here](#).

Any concern that a vulnerable adult or child may be suffering harm should be discussed with the lead safeguarding officer as soon as the concerns arise. They will make a decision regarding breaching confidentiality and progressing in line with our safeguarding policies.

If someone discloses abuse to you, remember to stay calm, listen carefully rather than question and be sympathetic. You must report the disclosure to the lead safeguarding officer as soon as possible and write down what was said and who you reported it to. Tell the person that you will take their disclosure seriously, what happened wasn't their fault and that you have to tell an appropriate member of staff/manager. You cannot keep the information to yourself if you think they or someone else is at risk.

Do not put yourself at risk, contact the alleged perpetrator, or tell anyone who does not need to know, in line with our policy.

Data Protection

Before we can collect, store, or use data about an individual, the data protection law and the General Data Protection Regulation (GDPR), requires us to ensure that we have that individuals consent to do so. The way we do this is by making sure we work within our data protection policy and procedures. You may, in your volunteer role with us, have access to and handle the personal information of the people you are helping. It's vital that you are aware of our policy and procedure found in the appendices.

Your contact details will be kept on a database and accessed only by appropriate staff. Your application form, references, emergency contact details will be kept securely. You have the right to access your personal record. From time to time we may want to use photographs of our volunteers in various publicity media. You will be asked to consent to this; it is not compulsory.

Read our [Data Protection Policy](#).

Confidentiality

Volunteers must maintain confidentiality during their time with Healthwatch Westminster. For this reason, when you complete your **Appendix 4 Volunteer Agreement** you are also signing a confidentiality declaration. This means that confidential information about people we support, volunteers, Healthwatch Westminster staff and our work is kept private, unless sharing this information is required by law. We follow the Confidentiality Policy of our host organisation, and a copy will be provided as part of your induction.

Dealing with difficulties and complaints

If you encounter a difficulty with any aspect of the role, or your experience with us isn't working out as hoped, please talk to your Volunteer Coordinator as soon as possible for advice and support. Together we will try to work out any difficulties.

We aim to make volunteering a positive experience but recognise that sometimes, for all sorts of reasons, problems can occur. We have a clear and fair problem-solving process to help resolve any issues at the earliest opportunity.

This process is only for dealing with concerns with the volunteer relationship; for other concerns or complaints please refer to our [Complaints Policy](#).

We will make reasonable adjustments within the organisations resources to ensure that volunteers can engage fully in the problem-solving process. Volunteers may bring a support person or advocate to any meeting that forms part of the problem-solving process.

Our problem-solving process

1. We will tell volunteers about any problems regarding their volunteering at the earliest opportunity and will agree a way to move forward in the role. If appropriate, volunteers could be offered training, or agree a change in their volunteering role.
2. If this does not resolve the problem, we will offer a formal meeting with our Lead Officer to discuss.
3. If a formal meeting is required, we will talk through our concerns with the volunteer, explain what the issues are and outline their impact. We will explore with the volunteer if there are any other opportunities to resolve the concerns and notify the volunteer of our decision within 15 working days.
4. If the volunteer does not agree with the outcome of the formal meeting, they may raise their concern as an appeal with The Advisory Group. The Advisory Group will acknowledge the appeal within five working days and offer an appeal meeting.
5. The Board will notify the volunteer of their response within 10 working days of this meeting. The Board's decision is final.

If we are unable to agree a resolution with the volunteer, they may be asked to stop their volunteering for the organisation. If this happens, we will signpost volunteers to other opportunities.

Please note there are some occasions where we will not be able to offer any support or the opportunity for volunteers to change their behaviour or practice. While not a complete list, this may include; threats, abuse or attacks on any staff, volunteer or customers, breaking policies on safeguarding of children or vulnerable adults, breaking confidentiality and criminal acts such as theft or fraud.

Whistleblowing

It is important that any fraud, misconduct or wrongdoing by staff or others working on behalf of Healthwatch Brent is reported and properly dealt with. Volunteers can raise any concerns that they may have about the conduct of others at Healthwatch Westminster or the way in which the organisation is run. Our **Whistleblowing Policy** sets out the way in which volunteers may raise any concerns that they have and how those concerns will be dealt with. A copy will be provided as part of your induction.

Equality, diversity and inclusion

We are committed to treating all volunteers and volunteer applicants fairly. We accept volunteers based on their suitability for the role.

We won't discriminate against any volunteers because of their age, disability, gender, marital status, pregnancy or maternity, race, religion or belief, sex, sexual orientation or socioeconomic background.

We expect our volunteers to uphold our **Equality and Diversity Policy** whilst representing us as a volunteer. The policy should be part of the volunteer induction.

Moving on and references

You can end your volunteer role with Healthwatch Westminster at any time. Please let your Volunteer Coordinator know. We would like to have a chat with you about your reasons for leaving, although this is not mandatory. If you have been a volunteer with us for over six months, we can also supply you with a reference upon request.

Appendix 1. Finance Policies and Procedures

Finance F6–Staff and volunteer expenses

Procedures title:	Employee and volunteer expenses
Document reference:	F9
Issue date:	April 2021
Version:	2.0
Date of last full review:	
Date of last minor update:	N/A
Approved by:	Head of Finance
Supporting documents:	Expense claim form
Training that supports the application of these procedures:	Support and coaching from finance staff
Next review date due:	October 2022

1.0 Procedure summary for employee and volunteer expenses

Staff and volunteers should be reimbursed for necessary extra expenses while on official The Advocacy Project business. In all cases expenses claimed must be justifiable and only out of pocket expenditure will be reimbursed. Spending is to be modest at all times.

2.0 Key responsibilities

These procedures apply to all employees and volunteers who pay out of pocket expenses on behalf of The Advocacy Project.

3.0 Detailed procedures for employee and volunteer expenses

Employees and volunteers must complete an expense claim form listing all items for which they are entitled to be reimbursed on a regular basis.

Expenses are to be authorised as follows:

Claimant

	Authorised by
Employees and volunteers	Line manager or budget holder
CEO	Chair/Deputy CEO
Trustees other than Chair	Chair/ CEO

Under no circumstances can an expense claim be self-authorized or authorized outside of the line management route.

3.1 General principles

Staff and volunteer expenses are typically for travel and for subsistence whilst on official business. All expenditure must be agreed with the budget holder for that service/activity before being spent.

If travel is considered essential, meetings should be organised so that wherever possible multiple meetings are arranged for that period. Travel should be planned as early as possible to take advantage of any advance booking discounts wherever possible.

It is the staff and volunteers responsibility to ensure they use the most cost effective method of transport for any necessary work related travel.

It is the employee or volunteer's responsibility to notify the relevant person of any hotel/travel reservations that need to be changed or cancelled and that they do so in a timely manner. We may require the employee or volunteer to reimburse any charges that could have been avoided if the reservation had been cancelled in a timelier manner. The Advocacy Project may recover any excess cancellation costs.

Claims will only be reimbursed on actual expenditure and not based on lump sum daily allowances.

Travel between home and place of work will not be reimbursed.

3.2 Receipts

All expense claims must be supported by receipts wherever possible. Where it is not possible, an explanation must be provided and this authorised by the person authorising the return.

Credit card receipts are not an acceptable receipt as it does not detail what was purchased.

3.3 What can be claimed?

3.3.1 Taxis

As a guide, taxis should only be used where public transport is not operational or where taking public transport would be unduly difficult or unsafe. For example, transporting IT equipment or when there are time constraints between appointments.

The use of taxis must always be approved in advance by a line manager.

3.3.2 Daily meal allowance

A daily allowance of up to £5 per day can be claimed for employees and volunteers who are working outside of their normal place of work between 7.5 and 10 hours. This is to cover light refreshments. Where an employee or volunteer has worked more than 10 hours an evening meal allowance of up to £12 can be claimed.

If an overnight stay is required and/or the day starts before 7am then a daily allowance of £4 is permitted for breakfast. If breakfast is included in the hotel price then there will be no additional daily allowance for breakfast.

Claims will need to be backed up by receipts. Amounts greater than these will also need a receipt and will only be authorised in exceptional circumstances.

London services/offices are counted as a normal place of work. Therefore, there is no allowance for working at a different London service/office if you typically work in London.

Under no circumstances will alcohol be reimbursed.

Meal	Eligibility	£
Breakfast	Overnight stay or day starts before 7am and working outside of their normal place of work for over 5 hours	4
Lunch	Working outside of their normal place of work for over 5 hours	5
Dinner	Working outside of their normal place of work for over 10 hours	12

Total if eligible for all	£21
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Example 1, an employee attends a meeting out of London. They take a morning train, have an overnight stay and return to London after 1700 the following day. In this situation they would be entitled to lunch and dinner on day one (£17) and breakfast and lunch (£9) the following day.

Example 2, an employee attends a conference from 10.00 to 18.30. In this situation they would be entitled to lunch (£5) as they have worked more than 7.5 hours out of their normal place of work.

3.3.3 Travel by private motor vehicle and parking

The use of a private motor vehicle must be approved by a line manager for the reason that:

- This expenditure would either be less than using public transport; or
- The use of public transport is impractical.

Where employees are using their private motor vehicles for official business they must provide original current full valid driving licence and current valid insurance for their private motor vehicle which allows the driver to use the motor vehicle for business use.

The claimable amount for mileage is based on HMRC approved rate. At the time this policy was approved, the rates were:

Type of vehicle	First 10,000 miles	Above 10,000 miles
Cars and vans	45p	25p
Motorcycles	24p	24p
Cycles	20p	20p
Fully electric cars	4p	4p

Parking will be reimbursed but where possible a receipt is required. Most machines will issue a receipt but be mindful of requesting one at the time of payment, usually by pressing a separate button.

Petrol consumption cannot be claimed in addition to mileage allowance.

The Advocacy Project will not pay for any cost of repair to the motor vehicle whether it is the employees fault or not. They must make claim for any accident to their insurance provider.

In no circumstances will penalty fines be paid, for example, parking or speeding.

3.3.4 Public transport, including rail and air travel

Only travel which incurs additional cost to the staff member or volunteer shall be reimbursed. For example, if a staff member already has a travel card to get from home to work and they can use it for The Advocacy Project business travel then there is no reimbursement as there is no additional cost to the staff member.

However, where there is additional cost this will be reimbursed. Where possible oyster cards should be used in London. Oyster cards should be registered online with Transport for London so journey statement can be used to support expense claims. Top up receipts are not acceptable as they do not detail the journeys.

If you are using London public transport on The Advocacy Project business on a regular basis, then consider getting an oyster card for The Advocacy Project travel only, which would be a claimable expense.

Rail and air travel should be economy class unless cleared in advance by the Head of Finance.

3.3.5 Overnight accommodation

Hotel accommodation should be mid-priced and appropriate to The Advocacy Project's charitable status. As a general guide, outside London is approximately £80.

3.3.6 Hospitality

There may be occasions when senior staff members are required to entertain. The claims for these occasions are to be met through the individual budgets. Prior approval from a Leadership Team member must be obtained before any entertainment can be considered. Receipts must be provided in all instances.

The expense claim must include the names or the persons present and the charitable reason for the entertainment.

3.3.7 Other expenses

Staff and volunteer expenses are about expenses incurred by an individual that cannot be procured by The Advocacy Project's purchase to pay system. For example, you cannot seek reimbursement for ICT equipment, stationery, furniture, equipment, as these can be purchased via our normal suppliers.

It can include other expenditure that cannot be purchased from normal suppliers, for example, eye tests. If you are in doubt, please contact the finance team for guidance.

For regular staff meetings at normal place of work, staffs are not normally expected to claim for subsistence.

In all cases the expenditure must be approved in advance by the budget holder or manager.

3.3.8 Volunteer and mentoring expenses

In addition to the above, volunteer and mentors can claim the following:

- Cost of public transport from home to place of volunteering
- Cost of lunch up to £5 per day if worked more than five hours

4.0 Expense advance

If an employee is regularly claiming expenses and it is becoming financially difficult, then an advance can be arranged with the approval of the line manager and Head of Finance and/or Deputy CEO. This advance is repayable when the employee leaves or is no longer having regular expense claims.

Advances must be reviewed annually by the line manager and the finance team.

5.0 Expense claim form

Expenses are required to be completed on The Advocacy Project's expense claim form and this is available in the shared drive. Full details of the expenditure must be given, including the nature of the expenditure and the reason for it. Where possible, all receipts must be included or provide an explanation for missing receipts. An explanation of 'I forgot to get one' is not acceptable.

The claim must be signed by the claimant to verify that the expenditure was spent on The Advocacy Project business.

The expense claim form is then authorised by the line manager and they are required to check:

- The expenditure was spent on The Advocacy Project business
- The expense claim is correct and follows this procedure
- The receipts are attached and where they are not, an explanation signed by the authoriser is provided.
- The correct account code, budget code and fund code have been used.

Any fraudulent claims could result in disciplinary or criminal action being taken.

Expenses claims must be sent to Finance to process and reimburse, they cannot be reimbursed through petty cash.

Claims may be returned if there is missing information, receipts are missing or it has not been signed or authorised correctly.

6.0 Payments

Staff and volunteer expenses received will be paid within 7 working days by bank transfer.

You must submit a claim within 2 months of incurring the expense. Expense claims submitted after 2 months will only be authorised in exceptional circumstances.

STAFF/VOLUNTEER EXPENSES CLAIM FORM

This form must be authorised and signed by your Line Manager. Submit with receipts attached to Finance team.

Name:

Date:

Account Code must be completed (by your line manager if not known) – see below for common codes **Cost Centre** is your project code – must be completed (by your line manager if not known)

Date spent	Amount	Account Code	Cost Centre	Description of Item
TOTAL				

Code	Item	notes
5110	Staff travel	
5120	Staff expenses/supervision	
5160	Meeting expenses	All expenditure for meetings with service users/clients, whether 1-to-1 or groups, eg refreshments, group resources, user travel
5170	Volunteer expenses	
5400	Office supplies	Items of general office use e.g. milk, tea. Cost centre = 099
5480	Stationery	Cost centre = 099 if not project-specific

<p>Approval for payment</p> <p>----- (line Mgr)</p> <p>----- (date)</p>	<p>Paid</p> <p>----- (initial)</p> <p>----- (date)</p>
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Appendix 2. Emergency Contact Details Record Form

Personal Details:	
Forename(s):	Surname:
Title:	Address:
Email:	
Mobile:	

Emergency Contact Details:	
Forename(s):	Surname:
Title:	
Relationship to employee:	
Contact address:	
Postcode:	
Telephone number:	
Mobile number:	
Email:	

Appendix 3. Declaration of Interests and Duties Form

I **[Name]** as employee/trustee/volunteer of Healthwatch Westminster have set out below my interests and duties in accordance with the organisation’s Conflicts of Interest and Duty Policy.

Category	Please give details of the interest and whether it applies to yourself or, where appropriate, a member of your immediate family, connected persons or some other close personal connection
Current employment or any previous employment in which you continue to have a financial interest.	
Appointments (voluntary or otherwise) e.g. Trusteeship, directorship, local authority membership, tribunals etc.	
Membership of any professional bodies, special interest groups or mutual support organisations	
Investments in unlisted companies, partnerships and other forms of business, major shareholdings (5% or more of issued shares) and beneficial interests	

List gifts or hospitality offered to you by external bodies and whether this was declined or accepted in the last twelve months	
---	--

Do you use, or care for a user of TAP's services? If so give details	
--	--

State any contractual relationship you or someone connected ¹ with you has with TAP	
--	--

Any other conflicts that are not covered by the above (eg. Being an Officer in a politically affiliated group or personal friends within the	
--	--

To the best of my knowledge, the above information is complete and correct. I undertake to update as necessary the information provided, and to review the accuracy of the information on an annual basis. I give my consent for it to be used for the purposes described in the conflicts of interest policy and for no other purpose.

Signed:

Position:

Date:

Appendix 4.

Volunteer Agreement

Volunteers are an important and valued part of our team at Healthwatch Westminster. We hope that you enjoy volunteering with us and feel a part of our team.

This agreement tells you what you can expect from us and what we hope from you. We aim to be flexible, so please let us know if we can help you in any way to make your time with us more enjoyable.

We will do our best to:

- Introduce you to how the organisation works, your role in it and to provide you with any training you need.
- Provide regular meetings with staff so that you can tell us if you are happy with how your volunteering is going and to receive feedback from us.
- Respect your skills, dignity and individual wishes and to do our best to meet them.
- Reimburse your travel expenses / pre-agreed meal cost incurred during your volunteering at our current rate.
- Consult with you and keep you informed of possible changes that may affect your volunteering.
- Insure you against injury you suffer or cause due to negligence.
- Provide a safe place in which to volunteer.
- Apply our Equality, Diversity and Inclusion policy in all parts of our delivery and activities.
- Apply our problem-solving procedure if there is a problem.

As a Volunteer with Healthwatch Westminster I agree to:

- Undergo a three-month probationary period and review process.
- Help Healthwatch Westminster to fulfil its objectives.
- Perform my volunteering role to the best of my ability.
- Follow the organisation's policies, procedures and standards, including health and safety, and equality, diversity and inclusion in relation to its staff, volunteers and service users.
- Maintain the confidential information of the organisation and its service users.
- Meet the time commitments and standards agreed and to give as much warning as possible whenever I cannot volunteer as expected.
- Attend regular supervisions appropriate to your need.
- Follow the organisation's performance and dealing with problems process.

This agreement is in honour only and is not a legally binding contract of employment.

Volunteer signature: _____

Date: _____

Healthwatch signature: _____

Date: _____

Appendix 5. Gifts and hospitality

You must declare all offers of gifts and hospitality, made to or by you, regardless of value, in your role as a member of The Advocacy Project volunteer. All such offers must be declared whether accepted or declined and recorded on the Gifts and Hospitality Register (the register). The register is maintained by the Company Secretary.

You may not under any circumstances accept gifts from anyone in receipt of our services. Gifts from suppliers and partners may be accepted providing they do not exceed more than £10 in value.

Hospitality offered should only be accepted where there is a direct link to working arrangements and a genuine business reason can be demonstrated, for example:

- attendance or speaking at a conference, which provides complimentary subsistence
- attending at a free training course
- attending a drinks reception to network

It is recognised that, in the course of carrying out your duties, you will need on occasion to ensure good relationships with existing and future contractors and stakeholders and that this may involve for example, the receipt of modest working lunches and dinners. These are acceptable where there is a genuine business reason.

Volunteers must be mindful that all gifts and hospitality offered by The Advocacy Project must be for legitimate purposes and demonstrate value for money.

In exceptional circumstances it may be appropriate for The Advocacy Project to provide a gift of up to £40.00 in value, such as providing a bouquet of flowers to a seriously ill employee or volunteer, or to a long standing employee or volunteer who is retiring.

It is acceptable for The Advocacy Project to provide modest hospitality in the way of working lunches to stakeholders subject to a good business reason.

It is your responsibility to ensure that you are not placed in a position that risks, or appears to risk, compromising your role or The Advocacy Project's duties. You should not be seen to be securing valuable gifts and hospitality by virtue of your job. You should not accept or provide any gift or hospitality if acceptance/provision will give the impression that you have been influenced/are deemed to be influencing while acting in an "official capacity".

Appendix 6. Code of conduct

This Code of Conduct sets out how Healthwatch Volunteers are expected to behave to each other and to those they come in contact with as a representative of Healthwatch.

Healthwatch members and volunteers must:

- Treat others with respect
- Respect equal opportunities, diversity and cultural differences
- Respect confidentiality
- Act in the best interests of Healthwatch
- Have regard to relevant professional advice
- To be an ambassador for Healthwatch
- Ensure reasonable attendance at meetings
- Act in accordance with legal and contractual requirements
- Follow the Nolan Principles of Public Life

The Nolan Principles of Public Life

- Selflessness – Holders of public office should act solely in terms of the public interest.
- Integrity – Holders of public office must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships.
- Objectivity – Holders of public office must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias.
- Accountability – Holders of public office are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this.
- Openness – Holders of public office should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing.
- Honesty – Holders of public office should be truthful.
- Leadership – Holders of public office should exhibit these principles in their own behaviour. They should actively promote and robustly support the principles and be willing to challenge poor behaviour wherever it occurs.