

## OR in Education Volunteer Policies

### **Welcome**

The OR Society takes the valuable contributions of ORiE volunteers seriously. This is reflected in the policies and procedures we have that cover both volunteers and staff.

### **Data protection policy**

Volunteers must maintain confidentiality during their time volunteering with The OR Society.

Volunteers do not have a contractual duty of confidentiality but are subject to a common law duty of confidentiality. If you are given information 'in confidence' you are legally obliged to keep it confidential. It is also important for ORiE volunteers to understand the [Data Protection Act](#).

### **Data retention**

There are no fixed rules about how long information should be retained. Volunteers should be aware that when they are acting on behalf of The OR Society, the data they collect or hold (such as contact details) belongs to The OR Society, not to them personally. It should therefore be passed along to the Education Manager, no personal copies should be kept.

### **Equal opportunities policy**

The OR Society is committed to respecting equality and diversity in all aspects of our work. We value the contributions of those with

diverse backgrounds and experiences and do not tolerate discrimination on grounds of age, gender, race, disability, religious belief or sexual orientation.

### **Recruitment & Selection**

The variety of skills and experience that volunteers can bring to ORiE is one of the programme's strongest assets. Anyone with experience studying or working in the field of OR can be a valuable member of our volunteer community.

Everyone is welcome to join the ORiE mailing list/volunteer database. The Education Manager will ensure all new volunteers are sent a copy of the [volunteer handbook](#) and [volunteer overview](#).

Volunteering opportunities are advertised to volunteers once a month via email. Interested volunteers should email the Education Manager, who will then allocate opportunities on a first come, first served basis. Many events can be attended by multiple volunteers.

If many volunteers show interest in the same event, volunteers who reply after the event is at capacity will be placed on a waiting list and informed as soon as possible if another volunteer is no longer able to attend.

Any volunteer with a disability will not be excluded unless it is clear that the volunteer is unable to perform a duty that is intrinsic to volunteering, having taken into account reasonable adjustments. Reasonable adjustments will be made to ensure that no volunteer is disadvantaged because of their disability.

### **Bullying & Harassment**

The OR Society are committed to promoting a workplace culture in which all volunteers are treated with dignity and respect. We will actively seek to prevent all forms of bullying and harassment on any grounds, by raising levels of personal and professional accountability, self-awareness and where necessary, swift and sensitive intervention.

### **What is bullying and harassment?**

For practical purposes those making a complaint usually define what they mean by bullying or harassment as something that has happened to them that is unwelcome, unwarranted and causes a detrimental effect.

Bullying may be characterised as offensive, intimidating, malicious or insulting behaviour, an abuse or misuse of power through means that undermine, humiliate, denigrate or injure the recipient.

Harassment is unwanted conduct related to a relevant protected characteristic, which has the

purpose or effect of violating an individual's dignity or creating an intimidating, hostile, degrading, humiliating or offensive environment for that individual.

Protected characteristics are:

- Age
- Disability
- Gender reassignment
- Marital status
- Pregnancy or maternity status
- Race, religion or belief
- Sex
- Sexual orientation

### **Harassment by Association, Perception and Victimisation**

The Equality Act 2010 allows for harassment claims from people who have the particular protected characteristic but also for reasons of Association, Perception and Victimisation.

Harassment by association is where a person is discriminated against or bullied for being connected to or having an association with someone who holds a protected characteristic.

Harassment by perception is where a person is discriminated against or bullied for being perceived as holding a protected characteristic even where this is a misperception.

Harassment by victimisation is the mistreatment of an individual for properly exercising their rights to raise a complaint about harassment or supporting an investigation.

### **Making a complaint about bullying or harassment**

Volunteers, or those with whom our volunteers interact, should, in the first instance, speak to the Education Manager about any bullying or harassment they have witnessed or experienced. It is hoped that in most cases the situation can be resolved through informal discussions. However, at any time any person who is putting forth a grievance may follow our grievance procedure in order to make a formal complaint related to bullying or harassment.

### **Expenses policy**

The OR Society will reimburse the costs incurred by OR in Education volunteers in accordance with the guidelines below.

### **Travel Expenses**

Wherever practicable, public transport should be used. Volunteers are asked to make every reasonable effort to find and use the cheapest fare (e.g. travelling standard class, booking advance or off peak tickets etc.). If rail travel is not practical, a car may be used. Mileage can be claimed at 45p/mile, along with any parking fees. Mileage may only be claimed once regardless of any additional passengers.

Any use of your own car for volunteering is subject to you:

- holding a full UK driving licence;

- ensuring that your car is roadworthy and fully registered; and
- holding comprehensive motor insurance that provides for volunteering use.

The Society accepts no liability for any accident, loss or damage, or claim arising out of any journey that you make whilst volunteering. The Society will not pay for the cost of any insurance policy on your own car. No costs will be incurred by The Society for any maintenance to personal vehicles.

In the following situations, additional approval prior to the event is required:

- If traveling by car and the round-trip journey is likely to be over 100 miles.
- If air travel is required for overseas trips or long-distance UK travel.
- If a taxi is required for a specific reason (such as remote area, large equipment etc.).
- If the total costs of travel expenses is likely to be more than £75.

### **Food Expenses**

The OR Society will reimburse costs for subsistence/meals where necessary, provided a visit is longer than four hours in duration and food is not provided. The value that can be reimbursed is £10 per person for each four consecutive hours a volunteer is on society business.

### **Overnight Accommodation**

Please seek written approval from The OR Society's Education Manager before booking overnight accommodation as this is assessed on a case-by-case basis. Typically, overnight accommodation and subsistence (breakfast and/or evening meal) will be reimbursed where a volunteer lives more than four hours away or when same-day travel would otherwise be during unsociable hours (before 06:00 or after 21:00). Volunteers are asked to make every reasonable effort to find a standard room at the cheapest price possible. The OR Society will not reimburse any additional costs or charges associated with accommodation, such as room service, the use of additional facilities or late check-out.

All receipts and tickets should be retained and submitted to The OR Society's Education Manager along with a completed expenses claim form and a completed feedback form. Please submit your claim within three months of incurring the costs.

Email the completed expenses form to: [education@theorsociety.com](mailto:education@theorsociety.com)

### **Grievance policy**

The OR Society believes that all volunteers, and those with whom our volunteers interact should be treated fairly and with respect.

### **Introduction**

Grievances are concerns, problems or complaints raised by a volunteer or anyone who has interacted with our volunteers. Anyone who has problems or concerns with their volunteering, working conditions or relationships with our volunteers may wish to raise them with The OR Society.

If you are unhappy about the treatment that you have received as a volunteer, by an OR Society volunteer, or about any aspect of your volunteering, you should discuss this with the Education Manager who will attempt to resolve the situation.

If you are unable to discuss your complaint with the Education Manager, or if the Education Manager is involved in the subject of the complaint, then you should approach the Executive Director who will explore your complaint with you.

It is hoped that in most cases your complaint can be resolved through informal discussions. However, where attempts to resolve a complaint informally do not work the formal grievance procedure should be followed.

Where possible, all grievance proceedings and records will remain confidential. If investigation is required there may be a need to disclose the source and detail of the grievance and therefore a promise of confidentiality or anonymity

cannot be given, as it could hamper investigations.

### **Informal Grievance Procedure**

Wherever possible, an initial discussion should be held between the complainant and the Education Manager. It is in everyone's best interest for an issue to be dealt with quickly and fairly at the lowest possible level and we hope that most concerns can be resolved at this informal stage. It is advisable that for reference the Education Manager and the complainant keep a note of the discussions and agreed actions.

### **Formal Grievance Procedure**

Tell the Education Manager the nature of the grievance: If it is not possible to resolve a grievance informally the complainant should raise the matter formally and without unreasonable delay with the Education Manager. This should be done in writing and should set out the nature of the grievance. This statement will form the basis of any future meetings and investigations.

We will hold a meeting to discuss the grievance: A formal meeting will be arranged with the complainant without unreasonable delay after a grievance is received. At the meeting you will be asked to explain the nature of your complaint. The OR Society and the complainant should make every effort to attend the meeting. The complainant will be allowed to explain their grievance and how they think it should be

resolved. The meeting may be adjourned for any investigation, if necessary.

Complainants can be accompanied: A complainant can be accompanied at any formal grievance meetings. The chosen companion may address the meeting to sum up the complainant's case, respond on behalf of the complainant to any views expressed and confer with the complainant during the meeting. The companion does not however have the right to answer questions on the complainant's behalf, address the meeting if the complainant does not permit it or prevent The OR Society from explaining its case.

We will decide on appropriate action: Following the meeting The OR Society will decide on what action, if any, to take. Decisions will be communicated in writing to complainants without unreasonable delay and, where appropriate, should set out what action The OR Society intends to take to resolve the grievance. Complainants will be informed that they can appeal if they are not satisfied with the action taken.

Taking the grievance further if not resolved: Where a complainant feels that their grievance has not been resolved to their satisfaction they can appeal. They should write to the Education Manager and state the grounds for their appeal without unreasonable delay. Appeals will be heard without unreasonable delay at

an appeal hearing which will be agreed with the complainant in advance.

The appeal will be dealt with impartially and wherever possible by the President or Vice President (if the President is unavailable) if they have not previously been involved in the case. Complainants can be accompanied at the appeal hearing. The outcome of the appeal will be communicated to the complainant in writing without unreasonable delay.

Following an appeal, the original decision may be confirmed, revoked or replaced with a different decision. The final decision will be confirmed in writing. There will be no further right of appeal.

### **Health and Safety policy**

The OR Society recognises and accepts its responsibility to maintain, so far as is reasonably practicable, the safety and health of its volunteers, and of other persons who may be affected by its' activities.

### **The OR Society's Responsibilities**

We regularly review volunteering best practice to ensure that safety hazards are identified, and accidents are avoided where practicable. In particular, we will regularly monitor the safety of any equipment provided for use by volunteers. We will also provide information on health and safety best practice to all volunteers.

### **Volunteer Responsibilities**

Volunteers are obliged to take reasonable care for their own safety and for others who may be affected by their acts or omissions and to co-operate fully with us in the arrangements made in relation to Health and Safety matters.

Should you feel concern over any health and safety aspects of your volunteering, this should be brought to the attention of the Education Manager immediately.

### **Fire Safety**

When entering a new building, always make sure you have familiarised yourself with all emergency procedures including the fire procedures. You need to know where the designated fire exits are and where the fire assembly point is. This information should be available from the event organiser.

### **First Aid**

All accidents and incidents must be reported as soon as possible to the onsite health and safety officer, whether any person has been injured or not. If you feel that it is a real emergency, please contact the emergency services immediately. You must also notify the Education Manager who will record the accident or injury that occurred.

### **Accidents, Near Misses, Hazards and Safety Risks**

We all have a responsibility to report any potential Health or Safety hazard including infectious or other

diseases, accidents, near misses or injuries associated with volunteering. Any accident, near miss or potential issue with ORiE equipment should be reported to the Education Manager, who will keep a record.

Volunteers should be aware of potential trip hazards, both for their own safety and the safety of those around them. Ensure that any personal belongings, or boxes from stand set-up (where relevant) are stored safely, ideally under a table.

### **Personal Safety**

If you are traveling to an event, let someone know where you are going and what time you are expecting to return. If you think that you are going to run over your original timescales, let them know.

If you are at all concerned that you are being placed in a dangerous situation through your volunteering, you must discuss this with the Education Manager.

### **Manual Handling**

Volunteering at an event may involve carrying boxes, moving furniture or other manual handling. Please follow the guidelines below when carrying or moving anything.

Do:

- Lift with your legs bent.
- Keep your back as straight as possible.
- Keep the load close to your body.
- Hold the load at opposite corners.

- Ask for help if you want assistance.

Don't:

- Keep your legs straight.
- Bend your back.
- Carry something you are uncomfortable lifting.

### **Smoking while volunteering**

It is against the law to smoke within a public building or in any enclosed area, and in business vehicles that are used by more than one person. Volunteers who smoke are permitted to take reasonable smoking breaks while volunteering however they must be taken in designated outside areas.

### **Expectant Mothers**

New and expectant mothers must inform the Education Manager of their condition as soon as possible to enable us to review practices and to ensure the wellbeing of the persons concerned.

### **Alcohol and Drugs**

You must ensure that you are fit to carry out your volunteering duties and not be impaired by the effects of alcohol or drugs, either legal or illegal. This includes the residual effects of drinking alcohol the night before.

### **Safeguarding policy**

As an organisation that delivers charitable activities, The OR Society has a duty to safeguard volunteers, staff members and participants. We aim to run The OR Society in a way that actively prevents harm, harassment, bullying, abuse and neglect.

We have rules and procedures in place which keep people safe while they are taking part in our activities. We are ready to respond safely and well if there is a problem. Everyone in the organisation has a role to play in safeguarding, it is part of our day-to-day activities.

All our safeguarding policies and procedures are publicly available on our website. They are reviewed on an annual basis.

### **Consent for photography and video recording**

When attending ORiE events, volunteers are welcome to take photographs of themselves, the stand and venue and share these on social media. We are very happy for you to tag The OR Society in any social media posts.

However, unless we have explicitly informed you that the event organisers have obtained consent for attendees to be photographed and for those photos to be shared, volunteers must not take or share images or videos that include identifiable features of students and attendees. This is to ensure we

comply with data protection and safeguarding responsibilities and to respect individual privacy.

### **Understanding Risks**

We understand, manage, record and review the safeguarding risks in The OR Society, considering everyone we work with. We understand that anyone can be at risk of abuse, people are at risk at different times and in different situations. We also recognise that while protecting our staff and volunteers may not be safeguarding, we still have a duty to keep them safe. The OR Society provides Health and Safety training for all staff and has a robust Health and Safety policy which is made accessible to all volunteers. The OR Society is also aware of the types of harm that can develop within an organisation and has procedures in place to resolve any issues which may arise as a result. These types of harm can be: discrimination, physical, sexual, emotional, psychological, neglect, financial or radicalisation.

### **Children and adults at risk**

The OR Society, like all organisations, has a responsibility to safeguard children. A child is anyone under the age of 18.

An adult at risk is anyone aged 18 or over who has needs for care and or support, as a result of care and support needs is unable to protect themselves from abuse or is currently experiencing or is at risk of abuse. Adults at risk may have a

mental or physical illness, have a learning disability, have addiction problems or be frail. Whether an adult is at risk or not is something which changes with their circumstances. Furthermore, everyone has the right to make decisions for themselves. We understand that when we are safeguarding adults, we must respect this to avoid causing harm by removing a person's freedom of choice.

Our safeguarding duties are proportional to the level of risk involved; therefore, we increase the time and effort we spend on safeguarding when we work with children through OR in Education, and have a [separate policy available](#) that focuses exclusively on safeguarding children. We expect that all volunteers supporting events involving children under 18 will be asked to give consent for an Enhanced DBS check and complete a short online safeguarding training module. We rarely work with adults at risk but are aware that a different approach is required for this group of people.

Staff and volunteers should never work alone with children or adults at risk.

### **Making safeguarding a priority**

Everyone at The OR Society is responsible for safeguarding. We make it clear to all staff, volunteers and people we work with that we intend to keep them safe, and that

they have a role to play in keeping others safe. They know they have a right to ask questions and know who to tell if they think something is not right.

### **Designated safeguarding lead**

The Head of Qualifications and Accreditation is The OR Society's Designated Safeguarding Lead. The Education Manager and the Head of Membership Engagement are Safeguarding Officers. The Designated Safeguarding Lead is responsible for managing referrals to social services, reporting when problems are discovered and keeping internal records up to date. They also connect with the local authority to keep up to date with the separate processes for children and adults at risk.

### **Our culture and values**

Everyone has a right to be safe from harm. We give staff and volunteers appropriate support and management expect staff and volunteers to behave in line with our values and to treat everyone with respect. Our bullying, harassment, grievance and whistleblowing policies outline:

- how we plan to protect staff, volunteers and people we work with
- our expectations for staff and volunteers
- our procedures for dealing with unacceptable behaviour.

### **Safer recruitment**

We consider how to make sure new staff members, volunteers or board members will be safe and responsible.

Our safeguarding policies and expectations are outlined to staff during their induction. Volunteer safeguarding expectations and information is available on our website and as part of the Volunteer Overview and Volunteer Policies documents. ORiE volunteer training also includes an overview of our child safeguarding expectations for volunteers.

Part of our safer recruitment strategy, and safeguarding children strategy, is that we do not allow people aged 17 or younger to volunteer with OR in Education.

### **Listening and feedback**

When somebody reports a concern or speaks up, staff and volunteers are encouraged to act with compassion and understanding. We will not allow anyone to be victimised for raising a safeguarding concern. Staff and volunteers are encouraged to speak up about things that happen to them within The OR Society as well as outside it and should be aware of our whistleblowing policies.

Safeguarding works best when people feel they are empowered to speak up and keep themselves and others safe. Therefore, we provide updates on safeguarding in The OR Society whenever relevant. We welcome feedback from all staff and

volunteers on our safeguarding policies and procedures. Staff have several ways to provide feedback, including an anonymous suggestion box. Volunteers are asked for feedback each time they volunteer with The OR Society.

### **What to do if you have a concern**

All staff and volunteers have a responsibility to report any safeguarding concerns or issues to the Designated Safeguarding Lead or Safeguarding Officers. They know how to recognise and report abuse or harm affecting people The OR Society has contact with, wherever that abuse has occurred, so that we can help people to speak up and take action. You don't need to be certain before you raise a concern, it is the responsibility of the Safeguarding Officers and Designated Safeguarding Lead to investigate concerns. We take historic and non-recent concerns as seriously as current or recent concerns.

To formally express your concern, please complete the [ORS Safeguarding Report Form](#) and email the completed form to [safeguarding@theorsociety.com](mailto:safeguarding@theorsociety.com).

### **Contacting a safeguarding officer**

Any of the safeguarding officers can be contacted via phone or email. Telephone 0121 233 9300 and ask to speak to the Head of Qualifications and Accreditation,

Education Manager or Head of Membership Engagement.

Email

[safeguarding@theorsociety.com](mailto:safeguarding@theorsociety.com) or [education@theorsociety.com](mailto:education@theorsociety.com).

### **Reporting a safeguarding concern**

If a safeguarding concern is shared with us, we will make an initial assessment of the concern. We will ask questions to establish what action has already been taken and whether anyone else in, or working with, The OR Society has been affected by the situation. We will decide what actions need to be taken and will make a record of the information we are given and the actions we take. Actions we may take depend on the situation:

- If it is an emergency, we will contact the emergency services first.
- If we receive an allegation that a member of staff or volunteer from The OR Society has harmed or abused a child or adult at risk, we will also contact the local authority safeguarding team.
- If we receive an allegation that a member of staff or volunteer from The OR Society has harmed or abused an adult who isn't at risk, we will follow our disciplinary procedures.
- If we receive an allegation involving another organisation, we will contact their Designated Safeguarding Lead to inform them.

- If the concern involves a student, we will report it to the school's Designated Safeguarding Lead as well so that appropriate safeguarding procedures can be followed.

Once we have assessed a concern, we will monitor the situation and record new information and actions as they arise. If possible, we will let the person who reported the concern know that we have taken action.

We understand that reporting a safeguarding concern can be difficult and will do our best to support anyone sharing concerns with us.

### **Closing a safeguarding concern**

Most safeguarding concerns fall into one of the three categories below:

- **Misunderstanding:** the person reporting didn't have the full information and when this was investigated, there was no wrongdoing found. We will provide full feedback to reassure the person reporting that the concern was investigated.
- **Malpractice:** the person was justified in their concerns. If possible, any action taken, including any learnings, will be shared with the reporter.
- **Malicious:** If, after investigation, we believe a false concern was raised we will follow our grievance procedures for volunteers or disciplinary procedures for employees.

We are responsible for closing safeguarding concerns. This will happen when we no longer have a role in the investigation or any actions to complete. Everyone involved in the concern will be told that it is closed, and we will update our records. This will include filing a final report, which will summarise the concern and show any changes to our policies as a result of the concern.

### **Whistleblowing policy**

The OR Society is committed to ensuring the highest possible standards of public service. This policy is intended to cover and help volunteers who have major concerns over wrongdoing within The OR Society where, due to unlawful or criminal action or other inappropriate acts or omissions, the interests of others or that of The OR Society is at risk.

### **The OR Society Responsibilities**

The OR Society will not tolerate any harassment or victimisation of a whistle-blower.

The OR Society recognises the difficulty volunteers may face in voicing concerns and assures them of support during the initial investigation process. The OR Society will seek to protect the confidentiality of volunteers who raise matters of concern where possible, unless required to provide evidence as part of an official investigation. It is also recognised that individuals may be reluctant to

voice their concerns, particularly if the conduct or action of another volunteer is involved. This may be true particularly if the complaint is about a member of The OR Society's staff. It is important that volunteers feel able to raise such concerns without fear of subsequent action being taken against them.

The OR Society will be responsible for monitoring this procedure and the concerns/issues that are raised as a result.

The Education Manager has a responsibility to:

- Take concerns seriously
- Consider them carefully and undertake an investigation
- Understand the difficult position a volunteer may be in
- Seek appropriate advice
- Take prompt action to resolve the concern or refer it on to an appropriate person
- Monitor and review the situation
- Ensure individuals who genuinely report concerns are not penalised in any way

### **Volunteer Responsibilities:**

All individuals who volunteer with The OR Society have a responsibility to:

- Work within their professional code of conduct
- Ensure that the best standards of care are achieved
- Report any concerns which might compromise these standards

- Raise concerns in good faith with a true belief that a malpractice has occurred
- Not raise concerns with any malicious intent

### **Confidentiality**

Whilst pursuing the aim of openness, it is imperative that client confidentiality is maintained, and that no parties unreasonably undermine the confidence in the services provided by The OR Society.

### **Anonymous Allegations**

We encourage whistle-blowers to put their name to an allegation wherever possible as anonymous allegations may often be difficult to substantiate/prove. Allegations made anonymously are much less powerful but will be considered at the discretion of the Executive Director or trustees. This consideration will take into account:

- The seriousness of the issue raised;
- The credibility of the allegation; and
- Whether the allegation can realistically be investigated from factors or sources other than the complainant.

### **Whistleblowing Procedure**

Volunteers wishing to raise concerns can discuss them with the Education Manager, Executive Director, another member of the Senior Leadership Team or any of the Trustees. Volunteers may be

accompanied during the discussions on the issues that they have raised.

### **Details of the Allegation**

Whether a written or verbal report is made, it is important that relevant information is provided including:

- The name of the person making the allegation and a contact point (unless it is agreed the allegation can be anonymous);
- The background and history of the allegation (relevant dates and name and positions of those who may have contributed to the allegation); and
- The specific reason for the allegation.

Although someone making an allegation will not be expected to prove the truth of any allegations, they will need to provide information to the person they have reported to, to establish that there are reasonable grounds for the allegation.

### **Resolution**

Wherever possible, volunteer concerns about The OR Society issues should be resolved locally between the volunteer and the Education Manager. The Education Manager will consider the issues fully and sympathetically. The Education Manager will record details of the allegation including:

- The record of the allegation;
- The acknowledgment of the allegation; and
- Any documentation supplied by the whistleblower.

If the allegation relates to fraud, potential fraud or other financial irregularity, the Treasurer will be informed.

If the allegation discloses evidence of a criminal offence it will immediately be reported to the Board of Trustees and a decision will be made as to whether to inform the Police.

The acknowledgment of the allegation will include:

- An indication of how The OR Society proposes to deal with the matter;
- An estimate of how long it will take to provide a final response;
- An indication of whether initial enquiries have been made;
- Information on whistleblower support mechanisms; and
- An indication of whether further investigations will take place, and if not, why not.

Where an anonymous allegation has been made, The OR Society may not be able to communicate what action has been taken.