



## **BOOKLET OF POLICY DOCUMENTS**

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## **1. INTRODUCTION**

The Policies & Procedures document was approved by the Board of Directors at its meeting on --/--/ and is updated regularly.

The manual applies to all volunteers and board members within the South East Radiotherapy Trust CLG (referred to throughout this document as SERT). The manual is not intended to be, and should not be interpreted as, a contract between the SERT and any person.

This manual should be used as a reference and as a general guide rather than as an inflexible rule book. It is a resource for interpreting the variety of situations that can occur within a charity.

In each case when the policies in this manual are applied to such situations action will be determined at SERT's discretion, on the basis of the particular facts or circumstances.

The Chairperson of the Board of SERT is responsible for ensuring that the policies and the procedures in this document are implemented efficiently and effectively. All other board members and volunteers (including voluntary Board and sub-committee members) are expected to facilitate this process. The volunteers and board members are responsible for reading, understanding, and complying with the provisions of the policies and procedures.

SERT will regularly review the policies and procedures at a minimum annually, to keep abreast of new legislation, changes in best practice, issues raised by volunteers and board members, and other relevant developments.

If you have recommendations for changes in certain policies and procedures, please contact the Chairperson of the Board.

If you have any questions about the application of a policy, you should contact the Hon Secretary.

### **1.1. About SERT**

SERT was established in 2005 to provide essential transport to cancer patients requiring radiotherapy attending the UPMC Whitfield Cancer Centre in Waterford and Cork University Hospital. SERT is a registered charity (CHY 16852) and relies entirely on volunteers, fundraising and donations. The Trust consists of seven trustees; the chairperson is Gordon Watson, a retired consultant surgeon. The trustees are also volunteers and give their time without charge.

Run entirely on the hard work of its volunteers and fundraisers, SERT currently has over 150 volunteer drivers and seven vehicles in its fleet. Catering for the South East of Ireland, it operates a door-to-door service. Users can be collected at a specific pick-up point (or their home), delivered safely and comfortably to the hospital and returned to the drop-off point of their choosing. SERT volunteers and vehicles are discreet and respectful to all and there is an ethic of confidentiality.

For many cancer patients, difficulty accessing transportation can be a huge strain and influence over their treatment and hospital choices. Those who receive radiotherapy may not feel able to drive during treatment which may continue over many weeks and many patients cannot, or do not want to, ask friends and family to drive them. SERT's volunteer driver service provides the solution.

SERT is extremely grateful to its numerous benefactors, including private individuals, fundraising volunteer groups, industry and trade unions. Working within our communities we can, by providing this transport, make a significant impact towards helping cancer patients receive state of the art radiotherapy and improve their outcome.

## **1.2 Our Vision**

SERT's vision is to provide door to door service for cancer patients with difficulty accessing transportation over their treatment.

It is our vision to expand to areas in the South East not currently provided for.

## **1.3 Our Mission**

'SERT.'s mission is to provide transport for cancer patients undergoing radiotherapy at the UPMC Whitfield Cancer Centre in Waterford or at Cork University Hospital.

We provide free, confidential and discreet transport services from each patient's home or pickup point to radiotherapy centres in Waterford and Cork.

## **1.4 Our Core Objectives**

The overarching objective is to assist cancer patients who have difficulty in attending treatments by providing them a door to door service and transportation

Our website provides extensive general information about SERT.

Please visit [www.SERT.ie](http://www.SERT.ie)



## 2. ORGANISATION CHART

**Chairperson**  
Gordon Watson

### **Board members**

1. Ms Joan Boland
2. Ms Carol Normoyle Hon. Tres.
3. Mr Denis Fahy
4. Mr Eamon Tierney
5. Ms Jenny Bulbulia
6. Ms Carmel Walsh
7. Mr Dominic Clancy Board Hon. Sec.

### **Volunteers**

#### **Co-Ordinators**

##### **Dungarvan;**

Margaret Power  
Ger Fitzgerald  
Liz Walsh

##### **Waterford**

Miriam Quinlan  
Carmel Walsh

##### **Wexford**

Martina Dempsey  
Ray Heffernan

##### **Tipperary**

Tom Howley  
PJ Quinlivan

##### **Kilkenny**

Claire Tynan  
Mary Doran

#### **Drivers**

**(not individually listed)**



## SERT HUMAN RESOURCE POLICY

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## SERT HUMAN RESOURCE POLICY

### **3. HUMAN RESOURCES**

#### **3.1 Equal opportunities**

SERT recognises that in our society certain individuals and groups of people are discriminated against, both directly and indirectly. They are denied equality of opportunity on many grounds including age, sex, sexual orientation, marital/civil status, caring responsibilities, mental or physical health/disability, race, colour, nationality, ethnic/national origin (including membership of the travelling community), political or religious beliefs, economic status, criminal record, trade union activity, or a combination of any of these. We strive to eliminate all such forms of discrimination and to create a climate in which equal opportunities are promoted as a means of developing the full potential of everyone who is involved with SERT. We do this by fulfilling our legal obligations and by taking positive action which goes beyond the requirements of the law, avoiding stereotyping and tokenism.

We are always seeking ways in which we can improve our record on equal opportunities, although the adoption and implementation of new measures may be constrained by the small size of SERT.

#### **3.2 Employment practice**

SERT is a charity body and does not have employment. All parties involved in SERT are volunteers and are treated with the same equal opportunities and fairness to potential and actual volunteers.

#### **3.3 Recruitment of Volunteers**

SERT's volunteers are recruited and selected on objective criteria which test the relevant skills, knowledge, experience, qualifications and personal qualities necessary for the role of a volunteer. No applicants are placed at a disadvantage by requirements which are not genuine occupational qualifications, as this would constitute indirect discrimination. Volunteer vacancies are advertised as widely as possible and within SERT and make reference to the operation of an equal opportunities policy to which our volunteers are expected to adhere.

#### **3.4 Training**

We provide training opportunities to all our volunteers to meet their training needs. All volunteers receive suitable and relevant equal opportunities training and are provided with a copy of this document.

#### **3.5 Volunteers working with SERT**

We actively look for ways in which we can achieve adequate representation amongst our volunteers, in terms of the community in which we operate. We will only be successful in attracting a wide range of people if we adapt to the needs of individual volunteers.

### **3.6 Our work with volunteer-involving organisations**

SERT provides a variety of services to various stakeholders which are run by, which involve, or which wish to involve volunteers. We will assist and work with any such organisation, provided that its ethos and operations do not contravene SERT's policy.

### **3.7 Premises, facilities and equipment**

SERT strives to make the physical environment in which we operate as attractive and user friendly as possible for volunteers and clients. This mainly involves the vehicle in which passengers are being transported in

### **3.8 Publicity**

In order to bring our message to volunteers, stakeholders and the general public, we publicise SERT as widely as resources will allow, using as many media as possible. We aim to be inclusive by using positive imagery of, and making reference to, all types of people. The language in our publications is clear and non-discriminatory. We seek to avoid using materials, colours, typefaces, etc. which are difficult to understand for certain groups of people (those lacking manual dexterity, those with sight problems etc.). We publicise our commitment to equal opportunities whenever appropriate.

**I confirm that I have received and understand the SERT's  
Human Resource Policy and will adhere to all its contents thereof**

**Name:** \_\_\_\_\_  
**(PRINT NAME)**

**Signed:** \_\_\_\_\_

**Date:** \_\_\_\_\_



## SERT VOLUNTEERING POLICY

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## **4. VOLUNTEERING WITH SERT**

### **4.1 Statement of Purpose**

SERT was established in 2005 to provide essential transport to cancer patients requiring radiotherapy attending the UPMC Whitfield Cancer Centre in Waterford and Cork University Hospital. SERT is a registered charity (CHY 4852) and relies entirely on volunteers, fundraising and donations.

Volunteers play a critical role in our work and we recognise that without them, we would not achieve our goals.

It is essential that we present a model of good practice in volunteer management. We regard volunteers as a valuable resource and encourage them to get involved at all levels of the organisation and within all appropriate activities.

We aim to train, support and supervise our volunteers to the best of our abilities, and to act quickly and fairly if difficulties arise. The purpose of this document is to provide guidance on all aspects of volunteering within SERT. It does not constitute a binding contract. These procedures apply to all volunteers who undertake tasks on behalf of and at the direction of SERT.

**The Board are responsible for ensuring that the policy and the procedures in this document are implemented efficiently and effectively. All volunteers are expected to facilitate this process.**

### **4.2. Becoming a Volunteer at SERT**

#### **4.2.1 Eligibility**

All prospective SERT volunteers are Garda Vetted and reference checked prior to becoming involved with SERT. Garda Vetting will be paid for by SERT. This applies to all new drivers and co-ordinators. New drivers must be aged under 69 years due to insurance policy restrictions.

#### **4.2.2 Applications**

SERT often advertises for volunteers but also received applications through word of mouth. Potential volunteers may also apply speculatively. Volunteers are recruited in accordance with SERT equal opportunities policy. In general volunteers are required to complete an application form.

#### **4.2.3 Recruitment**

Volunteers are required to meet with relevant coordinators and appropriate board members to discuss the role for which they have applied and their suitability for that role. If necessary, applications are short listed and suitable candidates are invited to attend an informal chat with the board. A written record of this meeting will be kept by SERT .

If your application to volunteer with SERT is approved then your references are checked (contact details of at least 2 referees must be provided). Other checks may also be completed. Volunteers are always advised in advance of the intention to make these checks.

#### **4.2.4 Clarifying volunteer role**

An outline of the volunteering role will be provided and whether it is a driver or co-ordinator. This will include the main aspects and description of tasks.

#### **4.2.5 Appointment**

Formal appointments are made after the role description has been agreed and all necessary checks have proved acceptable. No placements are made unless the requirements of the volunteer and the volunteer's coordinator can be met. New drivers must provide licence and insurance details and current penalty point status to the co-ordinator and company secretary in advance of appointment. They must also agree to notifying both parties of any new penalty points incurred immediately during their period as a volunteer to maintain the benefit of SERT insurance

### **4.3. Volunteering at SERT**

#### **4.3.1 Probation**

All placements are subject to an initial trial period of one month. At the end of this period, the coordinator will meet with the volunteer to discuss the volunteer's suitability for their role. At this point, volunteers may continue in their current role, be reassigned to a more suitable role, or the commitment be terminated.

#### **4.3.2 Working Environment**

Volunteers, depending on their role as either driver or co-ordinator will have access to laptops, phones and vehicles as required. They are included in the organisation's functions and decision-making processes wherever practical.

#### **4.3.3 Working times**

Volunteering times are agreed with the co-coordinator and monthly rosters are distributed. Voluntary time commitment is never expected to match full-time paid staff of organisations, but unscheduled absences can create organisational problems. When expecting to be absent, volunteers should inform the co-ordinator as soon as possible, so that alternative arrangements can be made.

#### **4.3.4 Appropriate behaviour**

Volunteers are expected to work within the policies and procedures of SERT and adhere to its ethos. As representatives of the organisation, they are responsible for presenting a positive image of SERT to the outside world.

#### **4.3.5 Representation of SERT**

Volunteers must seek prior approval from the Board before undertaking anything that might significantly affect the organisation. This includes, but is not limited to, statements to the press, joint initiatives with other bodies, and agreements involving contractual or financial obligations.

#### **4.3.6 Confidentiality**

SERT respects the volunteer's right to privacy and confidentiality. In turn, volunteers are responsible for maintaining the confidentiality of all privileged information to which they are exposed while volunteering with SERT. Any breach of confidentiality can only occur when it is justified to breach it.

#### **4.3.7 Records**

A system of records is maintained on all volunteers, including their 'Volunteer Position Description, duties performed, evaluation of work (if required), etc. Volunteer records are accorded the confidentiality.

### **4.4 Support and recognition**

#### **4.4.1 Support**

SERT endeavours to provide the support necessary to encourage and empower volunteers to make a meaningful contribution and gain significant benefits from their voluntary work. Support is always available from the local coordinator and the board.

#### **4.4.2. Expenses**

Where possible SERT will offer to reimburse any receipted out-of-pocket expenses individuals incur in the course of undertaking voluntary work for the organisation. Such costs should be agreed in advance between the local coordinator and the board and the volunteer in order to ensure clarity and avoid confusion later on.

#### **4.4.3 Insurance**

Insurance is provided by SERT to cover all volunteers contributing on behalf and at the direction of the organisation.

#### **4.4.4 Equipping volunteers to carry out their role at SERT**

##### **Induction**

All volunteers should receive induction when they begin volunteering with SERT . This consists of a general introduction to the organisation, as well as a specific orientation on the purposes and requirements of their volunteering role.

#### **4.4.5 On-the-job training**

Volunteers receive initial and ongoing "on-the-job" training to provide them with the information and skills necessary to perform their tasks well. The training must be appropriate for the demands of the position and the capabilities of the volunteer.

#### **4.4.6 Additional training**

Volunteers will be provided with additional training if required.

#### **4.4.7 Personal and vocational development**

Volunteers are encouraged to develop their skills while involved with the organisation and are assisted into assuming additional and greater responsibilities over time, if they desire this.

### **4.5 Conclusion of Volunteering at SERT**

#### **4.5.1 Corrective action**

If appropriate, corrective action may be taken following evaluation sessions. Examples include the organisation of training for an identified training need, the reassignment of a volunteer, or the dismissal of a volunteer.

#### **4.5.2 Service at the discretion of SERT**

Any voluntary service is at the discretion of SERT. SERT may, at any time, and for whatever reason, decide to terminate volunteers' relationships with the organisation. Similarly, volunteers may at any time, and for whatever reason, decide to terminate their relationships with SERT. Notice of such decisions should be communicated at the earliest opportunity, preferably in writing.

#### **4.5.3 Dismissal**

Volunteers who do not adhere to the organisation's rules or who fail to perform their volunteer assignments satisfactorily may be subject to dismissal. No volunteer's involvement will be terminated in writing until the volunteer has had an opportunity to discuss the reasons for possible dismissal with their supervisor. Grounds for dismissal include, but are not limited to, the following: gross misconduct, being under the influence of drugs (including alcohol), theft, misuse of equipment and materials, abuse of clients and co-volunteers, breaches of confidentiality, failure to abide by SERT policies and procedures, and failure to complete duties to a satisfactory standard.

#### **4.5.4 Concerns and grievances**

If volunteers are not satisfied that issues relating to their volunteering are being handled appropriately, they are entitled to have their concerns reviewed by the Chairperson or member of the Board. The Board members and the Co-ordinators will discuss the issue as soon as practical after receiving a written complaint, and take appropriate action. The Chairperson makes the final decision

#### **4.5.5 Exit interviews**

Where possible informal exit interviews are held with any volunteers who are leaving the organisation whether they have reached the end of their project or are leaving for some other reason. Interviews are usually conducted with the local co-ordinator and appropriate members of the Board and written records are kept. The session should ascertain why the volunteer is leaving, how they found the volunteering experience and what suggestions they offer to improve the way the organisation operates.

### **4.6 Additional Information**

#### **4.6.1 Cash/Vouchers**

Volunteers must not accept cash or its equivalent e.g. vouchers or tokens from any passengers. Passengers or their families can make a donation to SERT to support the programme.

#### **4.6.2 Home Visit**

Volunteers must not go to a client's home or meet in a non-public place without the prior approval of their coordinator and only for SERT related business.

#### **4.6.3 Vulnerable Persons**

SERT has a policy in regard to Vulnerable Persons which outlines the role and responsibility of SERT volunteers in relation to Vulnerable Persons. This should be adhered to.

#### **4.6.4 Dress Policy**

The dress policy for volunteers is smart casual.

### **4.7 Volunteer Roles available**

#### **4.7.1 Role of Co-ordinators**

The Co-ordinators play a vital role in SERT and facilitate the running of the service being offered. The Co-ordinator receives information on clients from the relevant hospitals and onwardly transmits this information to the drivers. This is done by email and by phone and all information is provided within adequate time for the drivers.

Rostering of the drivers is carried out by the Co-ordinator and all information held by the Co-ordinator is disposed of securely once it is no longer required. During the time the information is required it is held in a secure place under the SERT's GDPR policies.

#### **4.7.2 Role of the Drivers**

Drivers for SERT play a vital part in the running of the Charity. They receive information from the Co-ordinator by email or phone. This information is held securely and destroyed once it is no longer required.

The drivers may have contact with the passengers using their personal phones if a SERT phone is not available to confirm the times of departures. No passengers or clients names are held in their phones and it is deleted after use.

Each driver as they have direct interaction with each passenger will be Garda Vetted.

In the event that any passenger is sick during the journey the driver is trained to deal with the procedure under the Vulnerable Persons Policy.

The driver may be responsible for ensuring the vehicle is cleaned and in an orderly condition and has diesel at all times.

All private information for each passenger/client is destroyed/deleted as soon as it is no longer required.

#### **4.8 Other Policies and Agreements**

##### **4.8.1 Use of mobile phone**

If a mobile phone is used by SERT in the vehicle this phone is only to be used for contacting SERT clients/passengers and not for any personal use. It must remain in the vehicle and charged at all times.

##### **4.8.2 Use of Vehicles**

Vehicles cannot be used for any personal endeavours and only for SERT business. All drivers will agree this under the terms of the insurance.

##### **4.8.3. Holding of Confidential Information**

All confidential information can only be held as long as it is required. While it is required it must be held in a confidential place with no access by any other party.

##### **4.8.4. Disposal of Confidential Information**

As soon as information is no longer required it must be deleted from all forms of platforms including paper, email or phone technology.

**I confirm that I have received and understand the SERT's  
Volunteering Policy and will adhere to all its contents thereof**

**Name:** \_\_\_\_\_  
**(PRINT NAME)**

**Signed:** \_\_\_\_\_

**Date:** \_\_\_\_\_



## INFORMATION TECHNOLOGY POLICY

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## **5. INFORMATION TECHNOLOGY**

### **5.1 Computer policy**

SERT positively encourages the use of technology in the support of its charity. Technology is an essential part of many people's lives, enhancing productivity and creativity. However, its use carries risks as well as opportunities, both for the charity and for the users personally.

The policy is addressed to all users of SERT's information including those with access to email and telephones. It is intended as a guide for acceptable and unacceptable practice and is based on common sense and existing practice. This policy relies significantly on the good judgement of the individual as to what behaviour is appropriate. Accordingly it gives reasons for the position taken on a number of issues. However, if you are in any doubt about how the policy might apply to a particular situation, do speak to the Co-ordinator, or member of the Board.

Please note that this policy may be updated from time to time. You will be told of any significant changes.

Non-compliance with SERT's Information Technology policy may lead to disciplinary action up to and including dismissal.

This policy applies to Board Members, Co-ordinators and drivers of SERT

### **5.2 Valuable assets**

Computer equipment & facilities (PC's & laptops) and the information they contain are valuable to SERT. All volunteers should take all reasonable steps to ensure the security of these assets at all times.

### **5.3 Responsibilities**

#### **5.3.1 In general all Users are responsible for:**

- being aware of and understanding current policies
- complying with policies
- ensuring only authorised people use or have access to the information
- undertake to regularly file and email house keeping
- dispose of information as soon as no longer required
- reporting to the Company Secretary/Co-Ordinator any threats or breaches of policy.

### **5.4 Data protection**

The purpose of the data protection legislation is to ensure the accuracy, appropriateness and confidentiality of information collected, stored and used about individuals. It also ensures that individuals are allowed access to any data stored about them on computers. The data protection legislation applies to information held on computers, phones and email.

The Data Protection Commissioner (DPC) website clearly and simply states the Eight Rules of Data Protection as:

1. Obtain and process information fairly
2. Keep it only for one or more specified, explicit and lawful purposes
3. Use and disclose it only in ways compatible with these purposes
4. Keep it safe and secure
5. Keep it accurate, complete and up-to-date
6. Ensure that it is adequate, relevant and not excessive
7. Retain it for no longer than is necessary for the purpose or purposes
8. Give a copy of his/her personal data to an individual, on request

See the data protection policy for further information.

### **5.5. Origination of inappropriate material**

Inappropriate material is that which may be judged to be defamatory, discriminatory, obscene, illegal or otherwise capable of causing offence. When a person introduces material into SERT'S computing environment then they are considered to have originated this material. Origination of material includes:

- Downloading material from the internet
- Copying material from CD-Rom, USB memory stick or other storage device
- Introducing material through another device on the network (for example a scanner or email)
- Creating the material on a PC

If you receive inappropriate material from inside or outside SERT e.g. via e-mail or from another source, you will be classed as the originator of that material within SERT's computing environment if you pass it on to others.

If you receive this type of material then it is your responsibility to remove/delete this material from SERT's network. Under no circumstances should you distribute or use the material for any reason..

### **5.6 E-mail usage/Internet**

Computers and Internet facilities (such as e-mail) belong to SERT and are provided for charity use only. You are trusted to not make reasonable personal use of any of the email or computers. These should be used only for SERT activities and not for anything personal.

### **5.7 E-mail content**

It is essential that the same care is taken with the content of messages as with printed documents. Information sent by external e-mail can never be considered totally secure and all messages sent via e-mail can be identified as originating from SERT– even when those messages are posted anonymously.

Confidential information must not be sent outside SERT in any circumstances unless to a relevant third party including the hospital. Approval must be received from the Co-ordinator or Board in relation to this.

Anything stated in an e-mail could be used at legal proceedings in the same way as anything written in a memo or letter.

Information sent by e-mail can never be considered totally secure. A confidentiality statement is attached to all outgoing e-mails (external). It is important to note when using e-mail, recipients need to be informed if the certain e-mail being sent should not be distributed more widely. This is the case for all information distributed within SERT.

## **5.8 Mailbox management**

Mailbox storage size is limited and only information which is required to be kept for a certain period while a passenger is an ongoing client should be done. It should be deleted as soon as possible.

## **5.9 Information management**

### **5.9.1 Confidentiality**

All users must respect the confidentiality of information which may be disclosed to them in the course of their duties, and they must undertake not to divulge such information to any third party without the prior approval of the Board.

### **5.9.2 Good practice of IT housekeeping**

Housekeeping should be conducted regularly and any files no longer required should be deleted. This is an important task and should be compared with managing paper based information systems.

Therefore it is important to consider the following points when following good file management practice:

- Consider confidentiality of content of the files stored.
- Consider the storage space it demands.
- Consider the information's business usefulness and the possible legal requirements to retain it for a minimum period. Please contact the Company Secretary for guidance relating to appropriate retention periods.

It is your responsibility to ensure that any information you have ownership of is controlled appropriately.

## **CONFIRMATION**

**I confirm that I have received and understand the SERT's Information Technology Policy and will adhere to all its contents thereof**

**Name:** \_\_\_\_\_  
**(PRINT NAME)**

**Signed:** \_\_\_\_\_

**Date:** \_\_\_\_\_



## **SOCIAL MEDIA POLICY**

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## 6 SOCIAL MEDIA POLICY

### 6.1 Scope

This policy on social media must be read in conjunction with other policies. Particular attention is drawn to the data protection, GDPR and business confidentiality policies, all of which are applicable to social media usage.

This policy on social media applies to all volunteers. Social media is the collective term referring to social and professional networking sites (for example Facebook, LinkedIn, Twitter), blogs, wikis, boards and other similar online fora and the policy extends to all such sites and incorporates any future developments of such media. Breaches of this policy will be investigated and the organisation retains the right to take disciplinary action, up to and including dismissal.

This policy applies to *personal* social media usage. Volunteers who have access to the Trust's social media accounts for official company purposes must refer to the company terms of usage which apply to such accounts.

All IT resources are the organisation's property dedicated to achieving our objectives. Inappropriate use is not acceptable. Excessive activity is not permitted.

### 6.2 Applies to all Volunteers

SERT has a presence on social media and maybe accessed by the Board in updating the public in relation to their current activity. Any Board member or volunteer posing on their social media page must do so without any connection to SERT and the works of same. All volunteers are prohibited from using or publishing information on any social media sites, where such use has the potential to negatively effect the organisation and its members.

**I confirm that I have received and understand the SERT's Social Media Policy and will adhere to all its contents thereof**

**Name:** \_\_\_\_\_  
(PRINT NAME)

**Signed:** \_\_\_\_\_

**Date:** \_\_\_\_\_



## COMPLAINTS MANAGEMENT POLICY

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## **7. COMPLAINTS MANAGEMENT**

### **7.1 Definition of a complaint**

“complaint” is where a complaint is made about any part of the service provider and it is claimed that it does not accord with fair or sound administrative practice, and adversely affects the person by whom or on whose behalf the complaint is made;

### **7.2 Purpose**

#### **7.2.1 Who can make a complaint**

Any person who is being or was provided with a service by SERT or who is seeking or has sought provision of such service may complain, in accordance with the procedures established under this Part, about any action of SERT that-

- (a) it is claimed, does not accord with fair and sound administrative practice, and
- (b) adversely affects or affected that person.

### **7.3. How complaints can be made**

Verbal, written and email.

### **7.4. Acknowledgements**

Acknowledgement of complaints

Upon a complaint being received by or assigned to a member of the Board he or she shall notify, within 5 working days, the complainant, in writing, that the complaint has been so received and so assigned and outline the steps that he or she proposes to take in investigating the complaint and the time limits for the completion of the investigation.

### **7.5. List of stages of the complaints management process**

Stage1: Local resolution of verbal complaints at point of contact (Informal)

Stage2: Local investigation of written and serious complaints (Formal)

Stage3: Internal Review (by Board)

Stage4: Independent Review (Ombudsman)

## **7.6 Process**

It is the policy of SERT that the complaints management process implemented in SERT will:

- Address the needs of the client or complainant
- Promote client satisfaction through the way we handle complaints.
- Uphold the rights and protect the dignity of the volunteer.
- Preserve the confidentiality of the client as much as possible.
- Improve confidence in the service.
- Prevent, where possible and appropriate complaints from further escalation, which can be very time consuming and costly to resolve.
- Enable information about complaints to contribute to quality improvement and organisational learning.

## **7.7 It is the policy of SERT that:**

- SERT commits to a complaints management process that is fair, transparent, non-prejudiced, non-recriminatory and impartial.
- SERT is committed to a complaints process that ensures that complainants are not victimised and will not suffer any retribution from the organisation itself or its Volunteers.
- SERT is committed to safeguarding the rights of the complainant and the Volunteers member/service against whom the complaint was made to a fair and impartial investigation of the complaint.
- Co-ordinators and the Board take responsibility for and a strong participatory role in the investigation of complaints about their area of responsibility and must ensure that they make improvements to their service where required as a result of the findings and recommendations arising from the complaint investigation. They must also ensure that their Volunteers are appropriately supported throughout the complaint management process.
- Information is made available to clients on the Complaints Management Process at the set up of service stage by providing them with a copy of the Complaints procedure;
- Organisational policies and procedures supplied and explained to all volunteer through induction training and subsequent support, supervision and professional development;
- Volunteers are provided with the necessary skills and knowledge to manage any complaints they receive and to resolve minor complaints wherever possible at the first point of contact;
- Effective communication systems are in place to ensure service users and service providers are aware of and understand the complaint management processes;
- SERT will not tolerate vexatious or malicious complaints;
- SERT will endeavour to resolve all complaints as efficiently and close to the point of contact as possible;
  
- Complaints are recorded appropriately to facilitate the effective tracking of individual complaints as well as the effective monitoring and evaluation of the complaints management process itself;
- Data relating to complaints are collated to allow analysis of underlying patterns and trends;
- There is regular reporting to the Co-ordinators and where necessary the Board of Directors;
- The complaints management process is geared to a process of continuous improvement;



## **7.8 Training and Education**

SERT commits to providing education and training to all SERT Volunteers to enable them to effectively implement the complaints handling processes. Training will be provided on an incremental basis depending on the needs of the complaints system and on resource availability.

## **7.9 Record keeping**

The Complaints Procedure specifies what records need to be completed and maintained for complaints.

Complaint Investigation Report

Complaint Corrective Action Meeting Minutes

Compliments, Comments & Complaints Feedback Form (for clients)

Complaints Log

## **7.10 Confidentiality**

All personal information is held under strict legal and ethical obligations of confidentiality. Complainant identifiable information will only be made available on a strict need to know basis and with the consent of the complainant. For the purpose of data analysis and the identification of trends, no client identifiable information will be made available with the complaints.

## **7.11 Involvement of clients**

That fair procedures and natural justice will be afforded to both complainant and the person(s) against whom the complaint is made.

## **7.12 Regular internal and external reporting of trends**

SERT is committed to using complaint data analysis to improve decision making and service provision to the client. To that end, summary data on complaints received is presented by the Secretary for review at the Board meetings. An overview summary of all complaints received in the previous 12 months is reviewed. It is envisaged that SERT will provide the Board of Directors with an annual report on the complaints received by the service provider during the previous year under the following headings:

- The total number of complaints received
- The nature of the complaints
- The number of complaints resolved by informal means
- The outcome of any investigations into the complaints

**I confirm that I have received and understand the SERT's  
Complaints Management Policy and will adhere to all its contents thereof**

**Name:** \_\_\_\_\_  
**(PRINT NAME)**

**Signed:** \_\_\_\_\_

**Date:** \_\_\_\_\_