

Charity Policies and Procedures Templates



How to use these templates

The policies and procedures contained in this document are intended to be adapted and tailored to your specific organisation. Obvious slots exist for you to drop in your organisation name, or the job title of the relevant person, but it's important to read through the policies fully before deciding whether further changes are required!

There are also consistent references to some key terms like "staff", "volunteers", "beneficiaries", "Chief Executive". Using "find and replace" it should be easy to edit these so that they reflect the references or terms most relevant to your organisation.

It's deliberately low on formatting and design to make adapting it as easy as possible. Copying and pasting single policies into your own template should be easy, as should working the other way and dropping your existing policies into this document to create a comprehensive staff handbook.

While most of the policies are about procedures and processes, there are some relating to legal elements. Guidance around statutory provisions like parental leave etc. should always be checked against official guidance, and legal advice where necessary.

Most importantly, policies on their own are pretty useless if nobody knows what they are, why they say what they say, and how to use them effectively. Good policies and procedures should empower staff, and increase consistency and fairness across an organisation. Imposing them from above rarely encourages engagement, so if you are using this as the basis for a bigger review of how you operate, we would strongly recommend communicating and engaging with staff throughout that process.

And if you've got good policies and procedures in place, they're no good sitting unread in a drawer or on a server. At DSC we brief two policies every month as part of our staff briefing, which keeps them alive, reminds people of the most important things to remember, and helps to head off problems in advance. So we brief our performance review policy at the beginning of the year to remind everybody how it works, our annual leave policy in spring so that we don't end up with everyone trying to book the same week off, that kind of thing.

We hope you find these useful, and that they save you a small amount of time in developing your own policies, and a much bigger amount of time through having them in place when you need them the most.

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Complaints Procedure

Who is covered by this procedure?

All staff

What is covered by this procedure?

This procedure covers how to deal with complaints from beneficiaries, associates and third parties, both in terms of the steps that need to be taken and tips for effective complaint handling.

Purpose

Feedback from beneficiaries, associates and third parties and how we deal with them is invaluable in helping us to continuously improve. Negative feedback and complaints are particularly helpful in pinpointing what we need to do better, and if we deal with complaints effectively, we can often improve our relationships with beneficiaries and associates overall.

Complaints may be received by any member of staff and may arrive in many different ways – by letter or e-mail, by comments on a feedback form, in person from a *[delegate, speaker, trainer or customer, or by phone]*.

Process

All complaints should be addressed to the *[ACCOUNTABLE PERSON]*. Whoever receives the complaint must follow the process below:

Stage 1 Record the complaint

Complete Parts 1 and 2 of the Complaint Form and email it to the *[ACCOUNTABLE PERSON]*. Use the name of the complainant and date as the file name. Refer all complainants to the Complaints procedure on our website.

Stage 2 Dealing with the complaint

The *[ACCOUNTABLE PERSON]* will assign the complaint to the appropriate *[departmental manager]*. This *[manager]* will attempt to resolve the complaint and complete Part 3 of the Complaint Form.

Suggested timetable and check list for departing staff

Time frame before leaving	Person leaving	Line manager
Last one – two months	Delete/destroy any inactive records	Final approval for deletion/destruction
	Archive any disused documents that must be retained	Final approval for transferral of documents
	Delete/destroy duplicate documents and information material of no further use (in all forms)	Advice on potential need or otherwise for information material
	Prepare handover notes	Discuss action required with departing person
Last week	Update file list to include all active files	Discuss with all staff who use/access files
	Complete handover notes	Discuss action required with departing person
Last day	Save all important email	
	Delete or forward all remaining email	Probable recipient of active email. Ensure email folders are empty.
	Forward encryption codes to line manager	Check that personal drives are empty.

Also see 'Exit Interviews' and 'Leavers Procedure'.

[CHARITY NAME] Performance Review Form

Name:

Job Title:

Department:

Name of Line Manager:

Name of Senior Manager:

Date of Performance Review:

Areas to be reviewed:

(List areas agreed at Stage 1 meeting)

Review of previous year

- 1. What have you done particularly well during the last year?**
- 2. What areas do you feel you could have improved upon?**
- 3. Have you experienced any particular difficulties or barriers that have affected your ability to carry out your job?**

Shared Parental Leave Policy

Who is covered by this policy?

All staff

What is covered by this policy?

This policy outlines the eligibility for Shared Parental Leave (SPL) entitlements and explains how to apply and manage such leave.

Purpose

The purpose of this policy is to clarify for staff what is expected of them when requesting Shared Parental Leave.

Abbreviations used in this policy:

SPL: Shared Parental Leave
SMP: Statutory Maternity Pay
SAP: Statutory Adoption Pay
MP: Maternity Allowance
ShPP: Shared Parental Pay

The Policy

The Shared Parental Leave entitlement

Eligible staff may be entitled to take up to 50 weeks SPL during the child's first year in their family. The number of weeks available is calculated using the mother's/adopter's entitlement to maternity/adoption leave, which allows them to take up to 52 weeks' leave. If they reduce their maternity/adoption leave entitlement then they and/or their partner may opt-in to the SPL system and take any remaining weeks as SPL.

A mother/adopter may reduce their entitlement to maternity/adoption leave by returning to work before the full entitlement of 52 weeks has been taken, or they may give notice to curtail their leave at a specified future date.

If the mother/adopter is not entitled to maternity/adoption leave but is entitled to Statutory Maternity Pay (SMP), Statutory Adoption Pay (SAP) or Maternity Allowance (MA), they must reduce their entitlement to less than the 39 weeks. If they do this, their partner

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Volunteer Policy

Who is covered by this policy?

Volunteers

What is covered in this policy?

This policy outlines how *[CHARITY NAME]* will appoint and support its volunteers.

The Policy

Our aim for volunteers

At *[CHARITY NAME]* we value our volunteers and the contribution they make, and offer them the opportunity to experience the world of work while developing their skills.

Guidelines

Attracting volunteers

The *[Volunteer Coordinator or Personnel Manager]* should establish a network of volunteer sources, such as the local CVS or universities. If a phone enquiry or email is received from a prospective volunteer, they should be asked to email our *[Volunteer Coordinator/Personnel]* attaching a copy of their CV and a covering letter explaining their interest in volunteering for *[CHARITY NAME]*. Subject to the consideration of their CV they will be invited for an informal interview.

If after the informal interview *[CHARITY NAME]* and the volunteer decide to go ahead with a volunteering opportunity, the *[Volunteer Coordinator or Personnel]* will write to the prospective volunteer confirming this.

Induction and training

There will be an induction prepared and delivered by one of our staff, usually, but not exclusively the *[Volunteer Coordinator/Personnel Manager]*. This will include:

- Information about *[CHARITY NAME]* including where to access all policies, our vision, mission and our future plans
- The role of the volunteer
- Essential procedures such as timekeeping, rota and confirmation of legally acceptable hours worked if benefits are being claimed