

Skills Exchange Volunteering Code

Scope

This agreement describes the scope of the volunteering relationship, sets out the expectations for Lloyds Banking Group (LBG) colleagues and charities, and explains how data shared with a Lloyds Bank or Halifax Foundation (**Lloyds Bank Foundation for England and Wales, Halifax Foundation for Northern Ireland, Lloyds Bank Foundation for the Channel Islands – referred to as ‘The Foundation’ or ‘The Foundations’**) will be used.

Volunteering Code

LBG colleagues & charity:

1. The volunteering relationship is the joint responsibility of the Support Team and charity.
2. The Support Team and charity agree jointly how they wish the relationship to work and what level of confidentiality needs to be applied. Together, they identify which areas of the charity's operations will be discussed and which areas are private/not within scope.
3. The Support Team and charity respect each other's time and other responsibilities, ensuring they do not impose beyond what is reasonable.
4. The Support Team and charity treat each other with respect and courtesy at all times.
5. Any advice/guidance provided in the relationship is not official/professional advice on behalf of LBG (note that Support Teams should avoid giving such advice to charities - see point 16 below). In consideration for the support given to the charity, the charity accepts that that the support and any advice/guidance is provided as a goodwill gesture and that the Support Team and LBG will not be liable in any way (including but not limited to damage and financial loss of the charity) which may arise from the support, or any reliance placed on the advice or guidance.
6. Either party may dissolve the relationship at any time. Ideally, the Support Team and charity will work with their key contact* to resolve any issues prior to taking this step. If the decision is made to end the relationship, please confirm this with the other party to provide clarity. The Foundations can then seek to provide an alternative Support Team if requested.
7. The Foundations' responsibilities to support the Support Team ceases if they leave the employment of LBG. The Foundations' responsibility to support the charity ceases when their formal relationship with the Foundation expires (e.g. funding expiry). Neither of these eventualities precludes the Support Team relationship from continuing.
8. The relationship should not be exploitative in any way.

*Note: For charities, the key contact is their Regional Manager or Grants Officer. For Support Teams, this is Kirsty Allen (kirsty.allen@lloydsbanking.com) and Ruth Carswell (Ruth.Carswell@lloydsbanking.com).

Charity:

9. Please set aside the required time to sustain the relationship with your Support Team. If you don't have the capacity to sustain a relationship with your Support Team, please notify your Regional Manager, Grants Officer, or the Skills Exchange Programme Lead so that another solution may be sought.
10. The Support Team will act as a sounding board, and a source of support. While drawing on this, remember that your charity must remain responsible for its own decisions and actions.

11. The Skills Exchange is intended to support your charity's development and is not used to monitor your grant or assess your performance. However, if a Foundation is made aware of significant issues and/or malpractice at your charity, they will be followed up appropriately and in line with the Foundation's obligations. Where possible, we will work with your charity to address such issues.
12. The Support Team contact details are confidential. Please ensure that this information is handled in line with data protection requirements and used solely for the purposes of this programme.
13. Should Support Team members visit the charity's premises and/or meet service users, the charity is responsible for ensuring that its safeguarding policy is adhered to.
14. The charity is required to comply with its obligations under applicable Data Protection Laws to the extent such Data Protection Laws apply in connection with this agreement. By Data Protection Laws we include the Data Privacy Act 2018, the Privacy and Electronic Communication (EU Directive) Regulations 2003, and the General Data Protection Regulation (Regulation (EU) 2016/679).

Support Team:

15. The role of the Support Team:

- As a Support Team you help the charity to weigh up situations, through a process of reflection, questioning, challenging and feedback, and you share approaches, information and insights that help to progress their practice. Having offered input, allow the charity to come to a decision themselves and avoid giving advice to the charity.
 - Respond to the charity's needs and agenda rather than imposing your own agenda. While it's not a Support Team's role to intrude into areas the charity wishes to keep private, you might help them to recognise how other issues may relate to these areas.
 - Draw on your skills, knowledge, and experience in supporting the charity. If the charity's needs extend beyond the point where you feel confident in providing support, please refer the charity to another point of contact or support professional. Speak to the LBG leads Kirsty (kirsty.allen@lloydsbanking.com) and Ruth (Ruth.Carswell@lloydsbanking.com), or the Foundations lead Kirsten (volunteering@lloydsbankfoundation.org.uk) if you need help with identifying alternative sources of support.
 - Your support is aimed at strengthening, growing and sustaining the charity's activities. To aid this, avoid doing the charity's job for them. Prompt the charity to accept increasing responsibility for managing the Support Team relationship. Put in place measures to avoid building a dependency on your support. As the relationship nears its end, work alongside the charity to smoothly wind down the formal relationship.
16. While remaining helpful and flexible, remember that **you are not obliged to** undertake tasks e.g. sell charity products or become a trustee. As a Support Team you are requested not to give advice on grants/funding from the Foundation, and not to sell bank products.
 17. Please set aside the required time to sustain the relationship with the charity. If you don't have the capacity to sustain the relationship with the charity, please notify the LBG leads (Kirsty.allen@lloydsbanking.com & Ruth.Carswell@lloydsbanking.com) or the Foundations lead (volunteering@lloydsbankfoundation.org.uk) so that another solution may be sought.
 18. Remain open and truthful with yourself and the charity. It's important to act in a way which respects diversity and promotes equal opportunities.
 19. For the relationship to thrive, it's important that trust is established, and that the confidentiality of the charity remains paramount at all times. Don't disclose any part of the relationship without the explicit agreement of the charity.
 20. Please regularly update your line manager on how your support is progressing.

21. The charity contact details are confidential. Please ensure that this information is handled in line with data protection requirements and used solely for the purposes of this programme.
22. Should you visit the charity's premises you are obliged to:
 - a) confirm that the charity has public liability insurance cover of at least £5M. If the charity does not have this level of public liability cover, please meet virtually or off site
 - b) comply with any requirements of the charity's safeguarding policy.
23. Should you meet the charity's service users, you are obliged to comply with any requirements of the charity's safeguarding policy.
24. If any ethical issue (such as conflicts of interest) arises, please raise this with the LBG leads (kirsty.allen@lloydsbanking.com & Ruth.Carswell@lloydsbanking.com) at the earliest opportunity.

Volunteering Agreement

25. All parties agree to:
 - show their full commitment, in their respective roles, to the programme to gain the most from it;
 - protect each other's privacy and abide by the above Volunteering Code and the agreed boundaries of the volunteering relationship;
 - abide by and appreciate the confidentiality required in this programme;
 - complete impact surveys as requested by Lloyds Bank Foundation;
 - meet for a minimum of three 2-hour support sessions over the course of 6 months (or as mutually agreed);
 - decide their own contact rules setting out whether and how contact might be made between support sessions; and
 - advise their key contact if they wish to leave the programme.
26. The charity will take direction of the relationship with meetings taking place at mutually agreed dates and times.

Use of Charity Data

The Foundations will hold details of the charity contacts on its database for the purpose of managing the programme. The Lloyds Bank Foundation is required to comply with its obligations under applicable Data Protection Laws to the extent such Data Protection Laws apply in connection with this agreement. By Data Protection Laws we include the Data Privacy Act 2018, the Privacy and Electronic Communication (EU Directive) Regulations 2003, and the General Data Protection Regulation (Regulation (EU) 2016/679), the Data Protection (Jersey) Law 2018 and Data Protection Authority (Jersey) Law 2018 (together the JDPL) and the Data Protection (Bailiwick of Guernsey) Law, 2017 (the GDPL).

27. Charity contacts agree to:
 - the Foundations sharing their contact details with their Support Team;
 - and receiving communications and surveys from the Foundation in connection with the programme.

If you have any concerns or questions, please contact the Foundations Lead (volunteering@lloydsbankfoundation.org.uk).

Use of Colleague Data

The Foundations will hold details of participating colleagues on its database for the purpose of managing the programme. The Lloyds Bank Foundation is required to comply with its obligations under applicable Data Protection Laws to the extent such Data Protection Laws apply in connection with this agreement. By Data Protection Laws we include the Data Privacy Act 2018, the Privacy and Electronic Communication (EU Directive) Regulations 2003, and the General Data Protection Regulation (Regulation (EU) 2016/679), the Data Protection (Jersey) Law 2018 and Data Protection Authority (Jersey) Law 2018 (together the JDPL) and the Data Protection (Bailiwick of Guernsey) Law, 2017 (the GDPL).

28. Participating colleagues agree to:

- the Foundations sharing their contact details with their matched charity;
- and receiving communications and surveys from the Foundation in connection with the programme.

If you have any concerns or questions, please contact the Foundations Lead (volunteering@lloydsbankfoundation.org.uk).