



COMPLAINTS POLICY & PROCEDURE

Introduction

Lord Crewe's Charity views complaints as an opportunity to learn and improve for the future, as well as a chance to put things right for the person or organisation that has made the complaint.

Our policy is to

- provide a fair complaints procedure which is clear and easy to use for anyone wishing to make a complaint
- to make sure that all complaints are investigated fairly and in a timely way
- to make sure that complaints are, wherever possible, resolved and relationships repaired
- to gather information that helps us to improve what we do

Definition of a Complaint

A complaint is any expression of dissatisfaction, whether justified or not, about any aspect of Lord Crewe's Charity.

Confidentiality

All complaint information will be handled sensitively, telling only those who need to know and following any relevant data protection requirements.

Responsibility

Overall responsibility for this policy and its implementation lies with the board of trustees of Lord Crewe's Charity, who review the policy regularly and update it as required.

COMPLAINTS PROCEDURE

Complaints should be made to the Clerk, Michael Orde at michael.orde@lordcrewescharity.co.uk

Complaints about management of the Charity's property interests or conduct of the estate managers should be addressed to the Charity's managing agents, Savills (UK) Ltd, following Savills complaints procedure, initially contacting the Director responsible for the Charity's properties, Michael Evans on mdevans@savills.com

Stage One

1. Upon receipt of a complaint the Charity will contact the complainant to ensure that the issues have been fully understood.
2. In many cases, a complaint is best resolved by the person responsible for the issue being complained about. If the complaint has been received by that person, they may be able to resolve it swiftly and should do so if possible and appropriate.
3. On receiving the complaint, the Clerk or the Chair consider the most appropriate person to investigate it and to take appropriate action. If the complaint relates to a specific person, they should be informed and given a fair opportunity to respond.
4. Complaints should be acknowledged by the person handling the complaint within five working days. The acknowledgement should say who is dealing with the complaint and when the person



complaining can expect a reply. A copy of this complaints procedure should be attached. Ideally complainants should receive a definitive reply within a month. If this is not possible because for example, an investigation has not been fully completed, a progress report should be sent with an indication of when a full reply will be given.

5. Whether the complaint is justified or not, the reply to the complainant should describe the action taken to investigate the complaint, the conclusions from the investigation, and any action taken as a result of the complaint.

Stage Two

6. If the complainant feels that the problem has not been satisfactorily resolved at Stage One, they can request that the complaint is reviewed at Board level.
7. At this stage, the complaint will be passed to the Board of Trustees. The request for Board level review should be acknowledged within five working days of receiving it. The acknowledgement should say who will deal with the case and when the complainant can expect a reply.
8. The Board of Trustees may investigate the facts of the case themselves or delegate an individual Trustee to do so. This may involve reviewing the paperwork of the case and speaking with the person who dealt with the complaint at Stage One. The person who dealt with the original complaint at Stage One should be kept informed of what is happening.
9. If the complaint relates to a specific person, they should be informed and given a further opportunity to respond. Ideally complainants should receive a definitive reply within a month. If this is not possible because for example, an investigation has not been fully completed, a progress report should be sent with an indication of when a full reply will be given. Whether the complaint is upheld or not, the reply to the complainant should describe the action taken to investigate the complaint, the conclusions from the investigation, and any action taken as a result of the complaint. The decision taken at this stage is final, unless the Board decides it is appropriate to seek external assistance with resolution.

External Stage

As Lord Crewe's Charity is a registered charity, the complainant can complain to the Charity Commission if they are dissatisfied with the way in which Lord Crewe's Charity is handling the case.

<https://www.gov.uk/complain-about-charity>

Variation of the Complaints Procedure

The Board may vary the procedure for good reason. This may be necessary to avoid a conflict of interest, for example, a complaint about a Chair or trustee should not also have the Chair and/or trustee involved as a person leading a Stage Two review.