



# Membership Queries Policy

Policy Title	Membership Queries Policy
Document Type	Policy
Team Owner	Communications
Document Owner (Name)	Wendy Grindle, Director of Communications, Engagement and Marketing
Document Status	Live
Current Version	V1.0
Last Reviewed	23/10/2025
Next Review Due	23/10/2027
Approval Level	Trustee Board
Sensitivity	Internal

## Version Control:

Version	Date	Author / Owner	Approved by	Summary of Changes
v1.0	29/09/2025	Wendy Grindle	Trustee Board	First issue



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## 1. Purpose

This policy sets out how the John Muir Trust manages queries from its members. It provides a clear and fair process that ensures:

- Queries are addressed consistently, respectfully, and within available resources.
- Members are treated fairly and transparently.
- Staff are protected from unreasonable demands or behaviour.

## 2. Scope

This policy applies to all queries from members, regardless of communication channel (email, post, telephone, in person, social media, online forms).

It covers queries relating to:

- Membership administration (renewals, payments, changes of details).
- Member benefits and services.
- Questions about governance, finances, policies, and charitable activities.
- General enquiries about the Trust's work.

## 3. Principles

- **Courtesy and Respect** – All queries will be handled respectfully. Members are expected to treat staff similarly.
- **Transparency** – Members are entitled to clear and accurate information, shared where this is lawful, responsible, and proportionate in so far as being appropriate and without going beyond what is necessary to provide the information.
- **Fairness** – All members will be treated consistently and without bias.
- **Proportionality** – Resources are finite; responses will be reasonable but not unlimited.
- **Confidentiality and Compliance** – Responses will comply with data protection, safeguarding, contractual, and legal requirements.



## 4. Service Standards

- All responses to membership queries will be coordinated and issued by the Membership Team, regardless of who the query is addressed to. This ensures consistency, accuracy, and fairness in communication.
- Initial response will be issued within **10 working days**.
- Where more time is needed, the member will be informed of expected timescales.
- Queries will normally be answered by signposting to **existing published information** (annual reports, audited accounts, website, policies).
- The Trust will provide members with information that is already published or otherwise readily available. Where clarification is needed, we will explain or signpost. However, the Trust is not in a position to create new information, prepare bespoke analyses, or share unpublished working documents.
- In addition to published reports and policies, the Trust will maintain a Frequently Asked Questions (FAQ) page on its website, updated regularly to reflect common queries. Members may be signposted to this resource as part of query responses.

## 5. Limits and Boundaries

The Trust will share information where appropriate, taking into account confidentiality, data protection, and its duty to protect sensitive or commercially restricted material. This means some information, such as staff personal data, legal advice, or internal working documents, will not be shared. Wherever possible, the Trust will signpost members to relevant published sources to support transparency and understanding.

### 5.1 Excessive or Repetitive Queries

- If a member submits repeated or excessive queries, staff may provide a consolidated response or refer to the original answer/published materials.
- Staff are not expected to generate new analysis or information not in the public domain.

### 5.2 Unreasonable Behaviour

The Trust recognises that some behaviours can place an unreasonable demand on limited resources or cause distress to staff.



Drawing on best practice (e.g. Local Government Ombudsman, NCVO guidance), behaviour may be deemed **unreasonable** where it involves:

- **Volume of contact** – Submitting an excessive number of queries in a short period, or contacting multiple staff about the same issue.
- **Repetition** – Raising the same or substantially similar queries repeatedly despite responses that address enquiries clearly.
- **Demands** – Insisting on bespoke or immediate responses beyond what can reasonably be provided.
- **Unfounded allegations** – Making unsubstantiated or malicious accusations against staff, trustees, or the Trust.
- **Disrespectful or abusive communication** – Using hostile, offensive, or intimidating language.
- **Disruption** – Actions that frustrate or hinder the Trust’s ability to carry out its work.

### 5.3 Response to Unreasonable Behaviour

Where behaviour is considered unreasonable:

- Staff may decline to respond further to a particular query and instead direct the member to published information.
- The matter will be escalated to a manager for review.
- A formal written warning may be issued to the member, setting out acceptable standards of behaviour.
- In persistent or serious cases, the Trust may:
  - Limit contact to a single named staff member.
  - Restrict contact to a single method (e.g. written correspondence).
  - Set limits on the frequency of responses.
  - Decline to engage further on a matter.

Any such restrictions will be **proportionate, time-limited, and reviewed periodically** by a senior manager and, where necessary, the Board of Trustees.



## 6. Escalation and Review

If a member is dissatisfied with a response:

1. They may request a review by the Head of Membership.
2. If still dissatisfied, they may raise a formal complaint under the Complaints Policy.
3. Members retain constitutional rights to raise matters at the AGM in line with the governing documents.

## 7. Roles and Responsibilities

- **Membership Team** – Act as the single point of communication for all membership queries, ensuring consistent and coordinated responses on behalf of the Trust
- **Leadership Team** – Support staff with complex or repeated queries, and determine when behaviour is unreasonable.
- **Director of Communication & Engagement** – Accountable for policy implementation and resourcing.
- **Board of Trustees** – Oversight of fairness and transparency, and final decision-making where constitutional rights apply.

## 8. Monitoring and Reporting

- The Membership Team will maintain a log of queries, including those considered excessive or unreasonable.
- Recurring themes or frequently asked questions will be identified from the query log and used to update the FAQ resource on the website.
- Quarterly reports on query volumes, themes, and risks will be submitted to the Leadership Team.
- Significant issues will be escalated to the Board.



## 9. Review

This policy will be reviewed every **two years** or earlier if required by operational changes, legal/regulatory updates, or emerging risks.

## Appendix A: Examples of Query Handling

- **Example 1:** A member requests detailed management accounts. Response: direct to published annual report and summarised highlights; explain that unpublished internal papers cannot be shared.
- **Example 2:** A member repeats the same question via multiple channels. Response: provide one consolidated answer, refer to the original response, and note no further replies will be made on the same matter.
- **Example 3:** A member uses abusive language. Response: acknowledge once, state that abusive communication will not be tolerated, and escalate to management.

## Staff Quick Reference Guide

### Membership Queries – Do's and Don'ts

#### ✔ Do:

- Respond within 10 working days.
- Direct members to published information first.
- Stay polite and professional at all times.
- Escalate if behaviour feels excessive, repetitive, or abusive.

#### ✘ Don't:

- Create new or bespoke analysis for individual members.
- Share unpublished working papers, staff personal data, or confidential information.
- Respond repeatedly to the same query once it's been answered.



- Tolerate disrespectful or abusive behaviour – escalate immediately.

### Unreasonable behaviour includes:

- Excessive or repeated queries.
- Unreasonable demands for bespoke or immediate responses.
- Abusive, offensive, or intimidating communication.
- Disruption of the Trust's ability to operate.

### Escalation steps:

1. Provide one clear response and signpost to published info.
2. If behaviour continues, escalate to manager.
3. Manager may warn member in writing, set limits, or restrict contact.
4. Serious/persistent cases → reviewed by senior manager and Trustees if required.