



Volunteering Policy

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Definition of a Volunteer

“A person who gives freely and willingly of their time to help improve the health and wellbeing of patients, users, (and their families and carers) of the NHS in Scotland”

Strategy for Volunteering in the NHS in Scotland CEL 10 (2008)

Vision Statement

NHS Dumfries & Galloway values our volunteers. Volunteering enhances the services we provide, has benefits for our patients, individuals and helps build stronger communities. We know that the volunteers give their time for many reasons. Some are former patients wishing to give something back; others are former staff with expertise they want to share, for others it is the first step into a career in health and social care. We want to make sure that volunteers are treated in a fair and consistent way and they receive a high quality level of support.

Volunteers must be encouraged to express their views and should be treated as partners in the planning and delivery of NHS Dumfries & Galloway services. The Board is committed to continue to improve our volunteering processes and support the NHS Scotland Strategy on Volunteering.

Eddie Docherty
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1. INTRODUCTION

There is a well-established history of volunteering within Scotland with the Scottish Government's National Statistics department stating that as many as 30% of adults participated in volunteering through organisations or groups in Scotland. The social and economic impact that volunteers' contributions have on local communities show that, in recent years, there has been a great deal of emphasis placed on the rights and responsibilities of volunteers and the coordination of volunteer activity.

As one of the largest employers in the region, NHS Dumfries and Galloway is committed to being an exemplar employer, working in partnership with communities serving and fulfilling the responsibility of promoting social inclusion and equality of opportunity. NHS Dumfries and Galloway is also committed to supporting employees to undertake volunteering. The United Nations recognises four types of volunteering and each type are in evidence within NHS Scotland¹. These are:

- Service giving
- Mutual support
- Influencing and advocating on behalf of others; and
- Participation in decision-making

While successful implementation of this policy will ensure compliance with current legislation and national policy, NHS Dumfries and Galloway recognises both the moral and business case for maintaining good practice in relation to the involvement of volunteers within the organisation.

Volunteering in NHS Dumfries & Galloway happens in a number of ways: the majority of volunteers are engaged directly by NHS Dumfries and Galloway but others volunteer indirectly. Indirect volunteers are recruited, trained and supported by third sector organisations. Volunteering may take place on NHS premises, in the community or in people's homes.

2. PURPOSE AND SCOPE

NHS Dumfries & Galloway reflects the Scottish Government's Refreshed Strategy for Volunteering in the NHS Scotland CEL 10 (2008) and in response to the Lampard Review in NHS England demonstrated the importance of having a volunteering programme which is fit for purpose. In developing this Volunteering Policy we aim to achieve the following objectives:

- 1) NHS Dumfries and Galloway is an organisation that welcomes volunteers.

¹ Strategy for Volunteering in the NHS in Scotland, Scottish Government CEL 10 (2008)

- 2) Recognise that the role of volunteers within NHS Dumfries and Galloway (whatever role carried out) is complementary to the role of paid staff and does not substitute for it.
- 3) Set out the principles governing the involvement of volunteers and provide a set of procedures to ensure good working practice.
- 4) Define the roles, rights and responsibilities of the organisation and its volunteers.
- 5) Recognise that volunteering can benefit the health and wellbeing of the individual volunteer and has real benefits to the local community.
- 6) Encourage and enable the involvement of volunteers from socially diverse backgrounds.
- 7) Continue to build on existing relationships between all Voluntary Organisations in Dumfries & Galloway and NHS Dumfries and Galloway to enhance the volunteer experience.
- 8) To measure the impact of volunteering and plan for continuous improvement in volunteering management.
- 9) To develop a modern, dynamic and robust infrastructure for volunteering by working in partnership with organisations that have relevant expertise, e.g. Third Sector, Local Authority, Scottish Health Council, and other relevant bodies to identify how sharing ideas can add value to the process.
- 10) To influence the future development of policy and practice in relation to volunteering.

3. RESPONSIBILITIES AND ORGANISATIONAL ARRANGEMENTS:

In NHS Dumfries and Galloway the Executive Nurse Director has nominated responsibility for Volunteering.

There is a long history of volunteer involvement in NHS Dumfries and Galloway and volunteers contribute in a variety of ways. Volunteers are recruited directly or indirectly through voluntary organisations that provide support within hospitals or community or, as volunteers in specific voluntary sector projects that the board part funds and/or supports.

NHS Dumfries & Galloway believes that volunteers are complementary to the role of paid staff and do not undertake the work of paid staff.

The Volunteering Policy and accompanying procedures are intended primarily for the use of NHS Dumfries and Galloway employees and volunteers. A commitment to the principles contained within these documents would also be expected from voluntary organisations whose volunteers support NHS Dumfries and Galloway. However, NHS Dumfries and Galloway respects the independence of these voluntary organisations and recognises that they are responsible for the management of volunteers working on specific projects.

Other services involving volunteers and organisations commissioned by NHS Dumfries and Galloway to carry out work which involves volunteers, should have a volunteering policy, which adopts the commitments outlined in this policy and procedures statement.

4. MONITORING:

NHS Dumfries and Galloway is committed to an ongoing process of monitoring and evaluation of this policy in consultation with all relevant parties. To ensure we monitor the implementation of this policy an improvement plan will be developed by the Volunteering Steering Group. A Review of this policy will be undertaken by the Volunteering Steering Group no less than every two years.

5. EQUALITY AND DIVERSITY

Under the Equality Act 2010, NHS Dumfries and Galloway is obliged to eliminate discrimination, advance equality of opportunity and to foster good relations in respect of the nine protected characteristics defined by age, disability, sex, gender reassignment, race, religion/belief, marriage and civil partnership, pregnancy and maternity, and sexual orientation.

An equality impact assessment has been carried out on this policy.

The monitoring of volunteers by protected characteristic will take place securely and confidentially. This data will be used to ensure that NHS Dumfries and Galloway is meeting its duties under the Equality Act 2010.

6. DOCUMENT CONTROL SHEET

1. Document Status

Title	Volunteering Policy & Procedures
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Approver	Area Partnership Forum
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2. Document Amendment History

Version	Section(s)	Reason for update
1.0	Original Policy	Scheduled review and updating of the policy.
2.0	Policy Review	Scheduled review and updating of the policy.
3.0	Policy Review	Scheduled review and updating of the policy

3. Distribution

Name	Responsibility	Version number
Board Secretary	To place on policy register	3.0
Communications Team	Place on intranet	3.0
Board Management team	Distribution to teams	3.0
Healthcare Governance Committee	Noting	3.0
Board	Noting	3.0

4. Associated documents

- Strategy for Volunteering in the NHS in Scotland CEL (2008)
- Guidance on Reimbursement of Out of Pocket Expenses CEL 23 (2011)
- Safety and Protection of Patients, Staff and Volunteers in NHS Scotland DL (2017) 7
- Health & Social Care Delivery Plan
<http://www.gov.scot/Publications/2016/12/4275/downloads>
- Community Empowerment (Scotland) Act 2015
- Revised National Standards for Community Engagement 2016

5. Action Plan for Implementation

Action	Lead Officer	Timeframe
Place on policy register	Board Secretary	Following APF approval
Disseminate to teams	Board Management Team	Following APF approval
Place on Intranet	Communications team	Following APF approval
Use policy	All staff	Following APF approval

1.1 The Role and Value of Volunteering

NHS Dumfries and Galloway recognises, values and supports the important part volunteers play in the life and work of the organisation. Volunteers are individuals who choose freely to commit their time and energy to support the work of the organisation without receiving any financial benefit beyond reimbursement of out of pocket expenses. Volunteers aim to benefit patients, users of service, carers, the organisation and the wider community in which they live.

The scope for volunteer involvement is wide and includes work carried out by volunteers in both NHS Dumfries and Galloway premises and in the community. Volunteering can contribute to raising individual self-esteem and self-confidence as well as to regeneration of local communities and to society as a whole. Wherever they are working, the organisation will ensure that volunteers are involved in a relevant and appropriate manner.

1.2 Relationship with NHS Dumfries & Galloway Employees

The organisation is committed to ensuring that:

- The standards and conduct of volunteers should be of the same high quality as that of employees.
- Steps are taken to ensure that at all levels staff are clear about the role of volunteers and to foster good working relationships between staff and volunteers.
- Training and support is provided for those working alongside and managing volunteers.
- Volunteers are not asked to take on tasks formerly undertaken by employees or to work in ways which facilitate a decrease in paid employment.
- The work of Volunteers complements the work of employed staff and will not be used as a substitute for paid work.
- Volunteers are not asked to do the work of paid staff in times of industrial action, however they may continue with their regular duties.

1.3 Resources and Overheads

NHS Dumfries and Galloway recognises that, whilst developing effective volunteering relationships is an investment with significant benefits, there are many associated costs including staff time e.g. – Volunteer Manager. The organisation is committed to identifying and covering the costs of involving volunteers – e.g. reimbursing volunteer's out of pocket expenses, arranging volunteer's recruitment and selection including Disclosure/PVG, training, insurance, and staff costs to support volunteers in their placement "in keeping with [CEL 23 \(2011\)](#)

1.4 Recruitment and Selection

NHS Dumfries and Galloway will:

- Recruit volunteers from all sections of the community and in line with equality and diversity legislation.
- Make every reasonable effort to find placements for anyone who offers their time and energy. Where there is no suitable placement available, the volunteer will be informed of the reasons and signposted, where applicable, to another agency such as Third Sector Interface or other organisations recruiting volunteers.
- Place volunteers in accordance with appropriate volunteer recruitment and selection procedures. Volunteer placements will, however, be developed and defined by the needs of the organisation and its service users.
- Undertake appropriate References and Disclosure checking (including Protection for Vulnerable Groups (PVG) where necessary) for all volunteers in line with organisational policy.
- Carry out Occupational Health Checks where appropriate.

1.5 Information and Training

NHS Dumfries and Galloway will:

- Ensure that volunteers receive specific volunteer induction training, adult/child protection training, equality and diversity awareness training and role orientation including placement shadowing. In addition to this Refresher training specific to volunteer role will be required every three years. [http://www.sehd.scot.nhs.uk/dl/DL\(2017\)07.pdf](http://www.sehd.scot.nhs.uk/dl/DL(2017)07.pdf).
- Issue all volunteers with the Corporate Induction Manual as part of the induction process which they **must** read and sign prior to commencing placement.

- Provide each volunteer with tailored information relating to the area of healthcare with which they are involved.
- Provide volunteers with training in the specific tasks to be undertaken, and opportunities for learning and development.
- Ensure that volunteers are given the opportunity to contribute to organisational change and team development where appropriate and that procedures are in place to enable the views of volunteers to be represented.
- Explore the development of volunteer peer support and sharing of good practice for all volunteers.
- Provide support and supervision:
 - Volunteers will be assigned a named contact person for supervision and support, and will be given clearly specified lines of accountability.
 - The Volunteer Manager will keep a written record of support/supervision agreements within the Volunteer's personal file.

1.6 Expenses and Insurance

NHS Dumfries and Galloway will ensure that:

- There is a clear, consistent and accessible system for claiming out-of-pocket expenses.
- All previously agreed out-of-pocket expenses, including subsistence and travel, can be claimed on production of receipts. A mileage allowance, within the tax-free rate, is paid for volunteers using their own cars, on completion of a Travel Expenses Claim Form.
- Volunteers are adequately covered by insurance whilst they carry out their agreed duties both on the organisation's premises and in the community.
- Volunteers are given information on other legislation and policies which may affect them and they will be treated in the same way as staff for liability purposes.

1.7 References

On the basis of their voluntary work, after a period of 6 months, volunteers will have the right to request a reference from their named contact person.

1.8 Expectations

Volunteers are expected to:

- Participate in volunteer specific induction training, role orientation, shadowing and other core training dependent on the placement area.
- Sign the Volunteer Agreement along with the Board of NHS Dumfries & Galloway
- Comply with all NHS Dumfries and Galloway policies and procedures, particularly in relation to confidentiality, patient safety, health and safety, occupational health and Disclosure/PVG checks.
- Read the Corporate Induction Manual and sign to confirm they have understood the information contained.
- Respect the confidentiality of service users, staff and other volunteers and follow the organisations' Code of Positive Behaviour.
- Undertake their volunteering at mutually agreed times.
- Inform their named contact or a member of staff if they are unable to attend, wherever possible in advance.
- Inform their named contact if:
 - They have any issues of concern relating to their voluntary work.
 - They are unable to continue volunteering.
 - There are any relevant changes to their health status.
 - They are subject to any criminal proceedings during their period of volunteering.
- Volunteer drivers must ensure that they are covered for any driving roles and need to provide confirmation of this (from their insurance company) to the board. [CEL 23 \(2011\)](#)
- Be honest and reliable

1.9 Encouraging Employer-supported Volunteering

NHS Dumfries and Galloway will support employees that are involved in volunteering and will:

- Increase employees' awareness of the opportunities for volunteering through advertising in news bulletins, pre-retirement courses etc.
- Nominate a staff member to support, promote and encourage the involvement of employees in volunteering.
- Acknowledge the value of employees' volunteering activity, and the development opportunity it represents.

1.10 Developing and Sustaining Relationship with the Voluntary Sector:

A strategic approach to the development of volunteering is taken working with the local Third Sector Interface and other Volunteering Organisations to support the Integration of Health & Social Care.

NHS Dumfries and Galloway will endeavour to maintain and develop relations within the voluntary sector whilst respecting their independence. We acknowledge the significant contribution of volunteers working within NHS premises and services engaged through the voluntary sector.

1. Introduction

- 1.1 These procedures are intended for use along with the policy statement. They give further details on recommended good practice for the involvement of volunteers within NHS Dumfries & Galloway.

2. Preparation

- 2.1 Prior to recruiting volunteers, consultation and discussion should take place within teams, with employees and staff side organisations to ensure that there is a genuine benefit to patients in having a volunteer within a particular area and to develop a clear description of the role required.
- 2.2 A named contact person should be identified and the staff time and expenses determined to train, support and reimburse volunteers. The recruitment and selection procedures outlined below are intended to encourage rather than limit volunteering in the organisation and to ensure that volunteering selection procedures are in line with Equality and Diversity and Health and Safety policies, Disclosure/PVG checking and other good practice - to ensure the protection of patients, service users, paid staff and volunteers.

3. Recruitment

- 3.1 In order to reach a wide section of the community, recruitment will be by a variety of means e.g. the local Third Sector Interface or other relevant agency, adverts in the local press, poster campaigns, leaflets, contact with schools, colleges, universities, faith groups, community groups by word of mouth. NHS Dumfries and Galloway will regularly review the ways in which potential volunteers can offer their help.
- 3.2 NHS Dumfries and Galloway has an Equality and Diversity policy and will work to eliminate discrimination on the grounds of the nine protected characteristics (age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation). NHS Dumfries and Galloway also has a legal responsibility to advance equality of opportunity for these groups and will proactively engage with representatives from the protected characteristic groups during recruitment of volunteers.
- 3.3 NHS Dumfries and Galloway is committed to involving volunteers from diverse backgrounds. Through equality monitoring of our volunteers, the Board will work to ensure that volunteers from all sections of the community are welcomed.

3.4 People interested in voluntary work will be invited for an informal interview with their contact person and given application form and additional volunteering information.

3.5 Recruitment Procedures as detailed on Volunteering Flow Chart Diagram: A

4. Selection

4.1 All volunteers must complete a NHS Dumfries and Galloway Volunteer application form. Two written references are required and will be followed up.

4.2 As volunteers may be working with vulnerable people, they may be asked to provide information on a self declaration of convictions form about any criminal convictions that they may have. Some roles may not require this.

4.3 Disclosure and/or PVG Scheme Membership will be required for volunteers. This will be required for all volunteers working with children and to those who have substantial unsupervised access to patients on a sustained or regular basis.

4.4 Prospective volunteers will be informed at interview if there are any specific health requirements necessary for the voluntary work. (e.g. walking and standing).

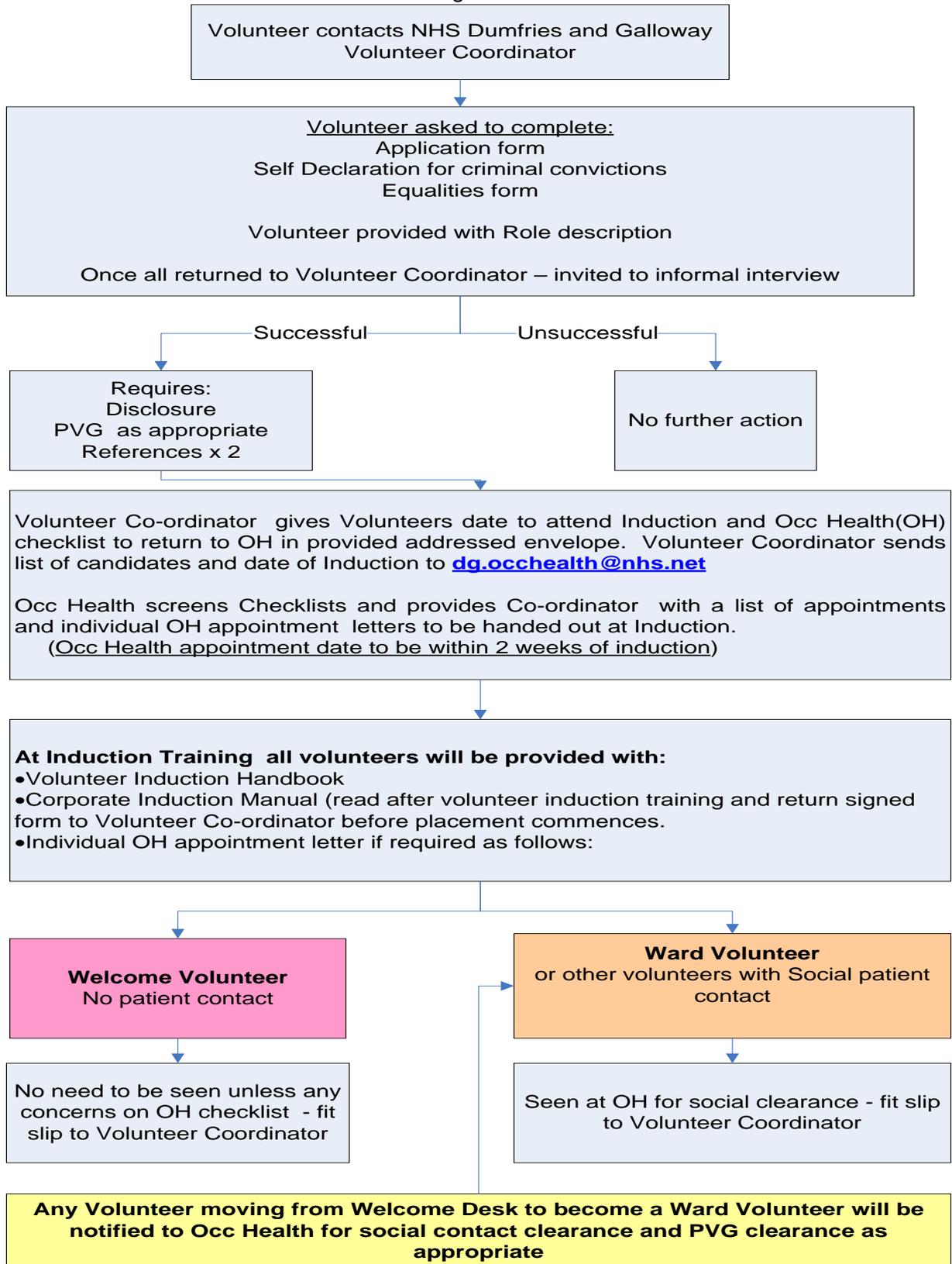
4.5 All information received during the selection process is dealt with in strict confidence

4.6 Selection of volunteer/volunteers will initially be the responsibility of the Volunteer Manager in conjunction with the Named Contact Person in the area of the organisation in which the volunteering will be carried out.

4.7 Prospective volunteers who offer their services will have their offers dealt with as quickly as possible. Where there is no suitable placement available, the volunteer will be informed of the reasons and where applicable referred to another agency such as Dumfries & Galloway Third Sector Interface or other relevant organisations.

4.8 Selection Procedures as detailed on Volunteering Flow Chart Diagram: A

Volunteering Flow Chart Diagram A



5. Records

- 5.1 Both paper and electronic records will be kept on volunteers including the application form, references, placement details, correspondence and any other relevant information. These will be kept for the purposes of security and Health and Safety. They will be kept secure with strictly limited access, for which the procedures will be explained to all volunteers during their induction period.

6. Induction

- 6.1 Volunteer Induction training is provided for all new volunteers and includes:
- Issue of Volunteer Handbook
 - Corporate Induction Manual including Health & Safety and Adult and Child Protection
 - Core Values
 - Boundaries & Code of Positive Behaviour/Healthy Understanding
 - Confidentiality
 - Equalities
 - ID Badges
 - Infection Control
 - Role & Qualities of a Volunteer
 - Dealing with Compliments & Complaints
 - Working with Patients with Dementia
 - Procedures for Claiming out of pocket expenses
 - Evaluation

7.0 Placement

- 7.1 Once Induction Training and all checks are completed then a suitable volunteering placement is identified and agreed.
- 7.2 Orientation to the volunteer placement is agreed and Volunteer Checklist should be completed jointly by the volunteer and staff. Volunteer session times are agreed and trial period established.

7.3 NHS Dumfries and Galloway reserves the right to ask volunteers to discontinue their volunteering without notice and will give the reason in writing if requested.

8.0 Resolving Issues

8.1 It is hoped that volunteers and NHS Dumfries and Galloway staff will work co-operatively and that all parties will benefit from any work undertaken.

8.2 Sometimes, however, difficulties may occur which cannot be resolved through normal support channels. In order to deal with such situations, both parties will be able to use the organisation's Problem Solving Guidance and Procedures for Volunteers, the aim of which is to assist both parties to find a mutually acceptable way of overcoming difficulties.

9.0 Support & Supervision

9.1 Regular support/supervision should be available to each volunteer. The type and level of support will depend on the needs of the volunteer and the area of work they are involved in. A written record of support/supervision agreements should be kept within the volunteers' personal file.

9.2 Volunteers will be assigned a named contact person for supervision and support, and will be given clearly specified lines of accountability and advice, support and feedback on a regular basis. A standard review date for new start volunteers will be set within the first two months of placement. The staff of the ward or department in which the volunteer is placed will also be expected to provide support and supervision as appropriate.

9.3 Opportunities will also be provided through meetings, training and social events, to meet other volunteers for mutual support and to discuss issues of common interest.

9.4 Volunteering is a rapidly developing area of social and community involvement. Where there are designated posts and staff involved with volunteers, the organisation recognises the importance of networking with other volunteer managers and keeping abreast of good practice.

10. Expenses

10.1 All previously agreed out-of-pocket expenses, including subsistence and travel, can be claimed on production of receipts. The rate of reimbursement will be agreed in advance and will be reviewed periodically. A mileage allowance, within the tax-free rate, is paid for volunteers using their own cars, on completion of a Travel Expenses Claim Form. [CEL 23 \(2011\)](#)

11. Volunteer Driving

11.1 The following points must be checked before a volunteer uses his/her own car in the course of their voluntary work.

- Does the volunteer hold a valid driving licence for the particular vehicle being used?
- An annual check of the driving licence should be undertaken to ensure patient safety.
- Is such a use permissible within the terms of the volunteer's motor insurance policy?

11.2 To ensure volunteers are covered for insurance, it is essential that their insurance company is aware that they intend to drive in a voluntary capacity. NHS Dumfries and Galloway will note the insurance expiry date for its records.

12. Insurance

12.1 NHS Dumfries and Galloway ensures that volunteers have appropriate cover in terms of Public Liability. The organisation will make volunteers aware of this cover.

13. Monitoring and Evaluation

13.1 Involvement of volunteers within NHS Dumfries and Galloway should be consistently monitored and evaluated with reference to this policy.

14. Recognising the Contribution of Volunteers & Volunteer Retention

14.1 Volunteer recognition is integral and ongoing part of the volunteer lifecycle. It starts from the second a potential volunteer expresses an interest in a volunteer role right through to the day they leave and get final thank you for their contribution.

14.2 The real key in meaningful long-term volunteer retention is the daily, weekly and monthly ongoing recognition from the Volunteer Manager and all NHS Staff coming into contact with volunteers.

14.3 NHS Dumfries and Galloway will hold a "thank you" event for Volunteers annually, to recognise the contribution they make to the service.

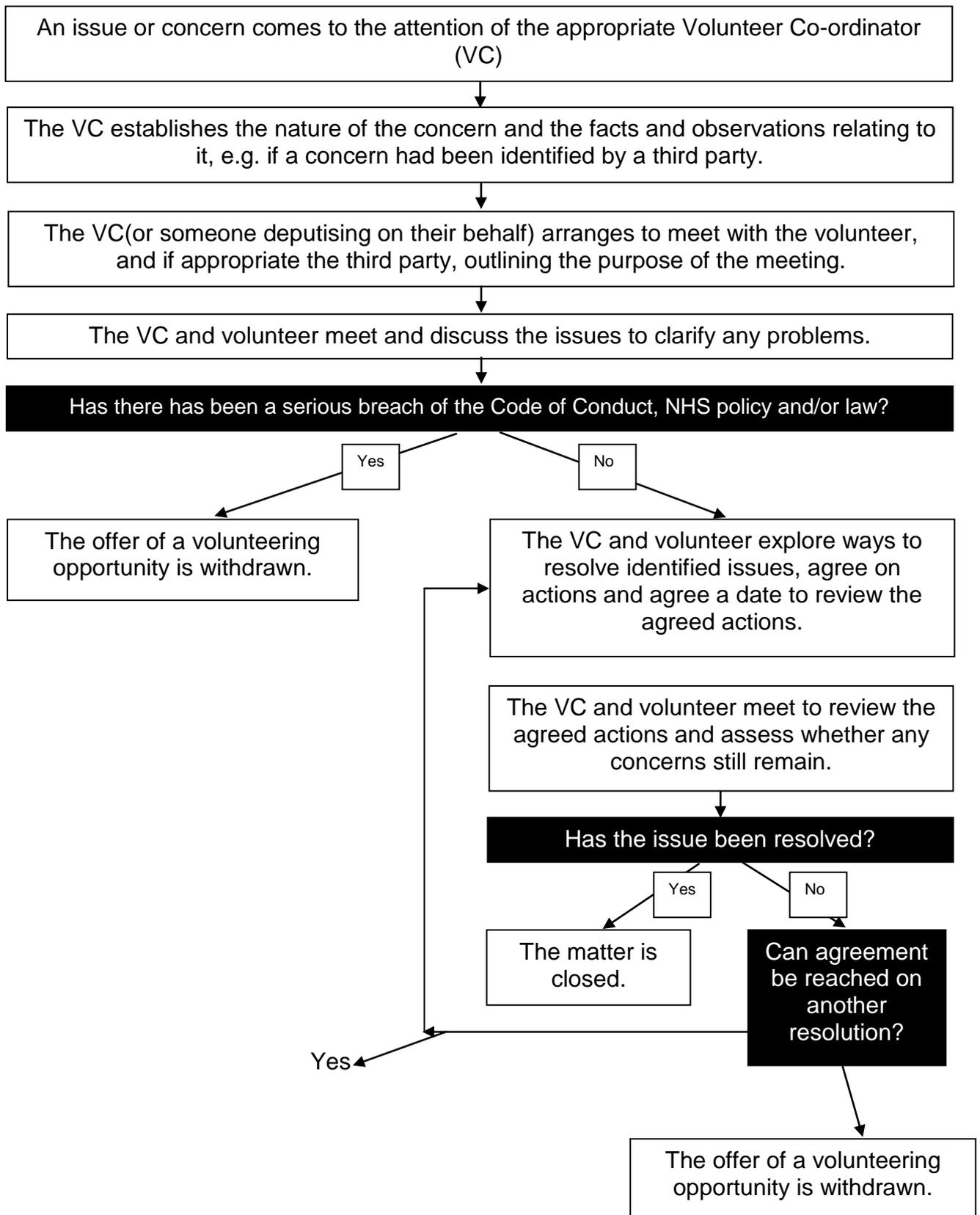
Problem Solving Procedures for Volunteers:

APPENDIX 3

1. Volunteers are not covered by employment legislation and therefore use of the terms “disciplinary” and “grievance” are more appropriate to employment situations and should be avoided in policies and procedures relating to volunteers. It is bad practice to remove a volunteer without adequate reasons and without following due process.
2. However, having clear guidance on what is and is not acceptable is very important to protect everyone. Having a clear problem solving process allows volunteer managers to deal with issues and to take action in a timely way and allows volunteer managers to make sure that volunteers are treated fairly. The problem solving process should be covered with volunteers as part of the induction process along with any other relevant policies.
3. There are three areas where a problem solving process can be applied:
 - Capability e.g. a volunteer’s ability to undertake the role
 - Performance e.g. how well they are performing the role
 - Conduct e.g. their behaviour when undertaking their volunteering
4. Taking action to deal with a volunteer where there has not been a serious breach of the Code of Conduct, NHS Dumfries and Galloway policy and/or law, should not automatically mean formal procedures are instigated, there are processes that should be followed as detailed in Diagram B below. However, where there has been a serious breach the offer of the volunteering opportunity can be withdrawn.

Process diagram

Diagram: B



5. If a volunteer feels that they have not been treated fairly or the above process has not been followed they will be able to make a complaint through the NHS Dumfries and Galloway complaints procedure.

Informal Procedures

6. Informal procedures are a starting point to resolve behaviour or performance that gives cause for concern and should be addressed as soon as possible. When addressing these issues volunteers may be unaware that their behaviours or conduct is giving cause for concern, particularly if guidance or policy has changed since they joined the organisation.
7. Regular support and supervision sessions are key to consistent management and communication with volunteers. They provide a good opportunity for discussion around performance or conduct including any specific concerns/complaints raised by a volunteer or about the volunteer.
8. When an issue arises, the volunteer manager should meet with the volunteer as soon as possible to establish the facts, any mitigating circumstances and agree with the volunteer an action plan including a timeframe for addressing the issues. Additional support such as more training and supervision along with the opportunity to change their placement, if appropriate, should be discussed and written records of all discussions kept on file.

Formal Procedures

9. If it is not possible to resolve issues using informal procedures then the volunteer manager should use the organisation's Problem Solving Procedures for Volunteering and any other associated policies which are relevant. Withdrawing the offer of volunteering can be one of the most challenging things that a volunteer manager has to do. This would only occur where there is no satisfactory improvement in a volunteer's capability, performance or conduct.
10. The volunteer should be informed as soon as possible of the reasons for withdrawing the volunteering offer and the date on which their volunteering will terminate. If a volunteer has to leave as a result of these proceedings, the decision should be conveyed in writing and other members of staff and volunteers should be made aware of the situation as appropriate.

Alternative Options

11. There are alternative options other than to remove a volunteer from a role. Alternative options should be discussed that would still allow the volunteer manager to address a volunteer's capability, performance and conduct but also to try and find a way for the volunteer to continue to volunteer with the organisation.