



Volunteering Policy

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Lead Executive:	Executive Nurse Director		
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Policy on a page

Summary & Aim	Key Requirements
- This Policy sets out the roles, responsibilities and governance for the NHS Dumfries & Galloway Volunteering Programme. - It reflects NHS Scotland Volunteering Best Practice (2023–24), Scotland's Volunteering Action Plan, and UN Volunteers typology (2020). - It incorporates updated national statistics from the Scottish Household Survey 2024 and clarifies arrangements for third-sector volunteering.	- Equality Impact Assessment - Appendix 1 – Volunteering Procedures - Appendix 2 – Staff Procedures for involving volunteers - Appendix 3 – Problem Solving Procedures for volunteers
Target Audience	Previous Names
- All NHS D&G volunteers (direct) - Line managers - Clinical and non-clinical teams working with volunteers	Volunteering Policy

Equality and Diversity Statement
NHS Dumfries and Galloway recognises that some communities within society are more likely than others to experience discrimination, prejudice and inequalities. The Equality Act 2010 specifically recognises the protected characteristics of age, disability, sex, race, religion or belief, sexual orientation, gender reassignment, pregnancy and maternity, and marriage and civil partnership. The Fairer Scotland Duty, also requires NHS Dumfries and Galloway to actively consider how socio-economic disadvantage can be reduced when making strategic decisions. NHS Dumfries and Galloway is committed to promoting and advancing equality, removing and reducing discrimination and harassment and fostering good relations between people that hold a protected characteristic and those who do not. This applies both in the provision of services and as our role as a major employer. NHS Dumfries and Galloway believe that all people have the right to be treated with dignity and respect and is committed to the elimination of unfair and unlawful discrimination practice.

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1. PURPOSE AND RATIONALE

1.1 Purpose

This Policy sets out the roles, responsibilities and governance arrangements for the development and management of the NHS Dumfries & Galloway Volunteering Programme. It ensures that volunteer involvement is safe, effective, and inclusive and aligned with NHS Scotland policy, national frameworks and local service needs.

1.2 Rationale

NHS Dumfries & Galloway recognises the essential role volunteers play in enhancing the experience of patients, families, carers, visitors and staff. Volunteers complement, never replace, the work of paid staff and contribute to community wellbeing, patient support, social connection and service improvement.

1.3 National Outlook

Volunteering across Scotland is evolving. After reaching a low point in 2023, formal volunteering participation recovered to 25% in 2024, and 48% of adults volunteered formally or informally during that year, signalling a national return toward pre-pandemic levels. At the same time, inequalities in participation continue to widen between demographic groups and communities. This policy reflects the need to ensure volunteering within NHS Dumfries & Galloway is inclusive, accessible and responsive to these trends.

1.4 Policy

This Policy has been reviewed and updated from the previous policy dated in 2022 and incorporates:

- a) NHS Scotland Volunteering Best Practice (2023–2024)
- b) Scotland's Volunteering Action Plan
- c) UN Volunteers global volunteering typology (2020),
- d) Clear Pathway guidance for third-sector volunteers operating in NHS settings.

2. POLICY AIMS

2.1 The aims of this Volunteering Policy are to:

- a) Formally acknowledge and support the role and value of volunteers.
- b) Provide a clear framework for volunteer involvement that is safe, person centred and consistent with national NHS Scotland standards.
- c) Define the roles, responsibilities and boundaries for volunteers, staff and partner organisations.
- d) Promote inclusive, accessible and diverse volunteering opportunities.
- e) Recognise the contribution of volunteering to individual wellbeing and community resilience.
- f) Ensure volunteers complement but do not replace paid staff.
- g) Support continuous improvement, evaluation and responsiveness to national volunteering data and local need.
- h) Strengthen collaborative working with voluntary organisations and third-sector partners.
- i) Secure and manage charitable funding to strengthen and sustain the Volunteering Programme in alignment with organisational priorities and national volunteering standards.

3. POLICY SCOPE

3.1 Applicability

This policy applies to all volunteers directly recruited, trained and supported by NHS Dumfries & Galloway, volunteers who support NHS services through approved third-sector partners operating within NHS premises or as part of commissioned services, and patient, carer and public involvement volunteers (including Public Partners, Forum members and advisory groups).

3.2 National Context

The Scottish Household Survey 2024 reports a renewed national commitment to volunteering, with 25% of adults formally volunteering and 48% volunteering in some capacity. NHS Dumfries & Galloway recognises the importance of creating volunteering opportunities that reflect the region's rural geography, community strengths and local health inequalities.

3.3 UN Categories of Volunteering

NHS Dumfries & Galloway recognises the five global volunteering categories defined by UN Volunteers (2020): mutual aid, philanthropy/service volunteering, advocacy/campaigning, participation/governance, and volunteering as leisure.

3.4 Third-Party Volunteering

Where volunteers are recruited and supported by external third-sector organisations, those organisations must operate in line with NHS Scotland standards, Clear Pathway guidance and agreed local governance arrangements. A separate Third-Party Volunteering Policy will set out additional requirements for external organisations providing volunteers into NHS Dumfries & Galloway services. This policy will be developed and published in 2026.

3.5 Exclusions

This policy does not apply to paid staff, student placements/traineeships, contracted services, visitor supporters or volunteering wholly outside NHS settings where NHS D&G has no responsibility.

4. DEFINITIONS

4.1 Volunteer

“A person who gives freely and willingly of their time to help improve the health and wellbeing of patients, carers, families and users of the NHS in Scotland.”
(NHS Scotland Definition CEL 10, 2008)

4.2 Types of Volunteer Engagement

- a) Direct volunteers – recruited, trained and supported by NHS staff.
- b) Indirect volunteers – recruited and managed by third-sector organisations.
- c) Commissioned services volunteers – recruited and managed by organisations funded to deliver specific services.

4.3 Volunteering Vision

NHS Dumfries & Galloway recognises and celebrates the powerful contribution volunteers make to the health, wellbeing and experience of the people we serve. Volunteers bring unique strengths; lived experience, skills and compassion that enrich our services, strengthen our connection with communities, and help us deliver outstanding person-centred care. Every interaction with our volunteers should reflect our values of Care, Compassion, Openness, Respect and Excellence.

Our vision is to build a modern, dynamic and compassionate volunteering programme that reflects the strengths of Dumfries & Galloway. By working together volunteers, staff, partners and our wider population we will foster a culture of kindness, inclusion and excellence, keeping volunteering at the heart of the care we provide.

5. DUTIES / RESPONSIBILITIES

5.1 Executive

The Executive Nurse Director is the Nominated Lead for Volunteering and holds strategic responsibility for volunteering governance, quality, safety and compliance with national standards.

5.2 Strategic Lead

The Director of Allied Health Professions is responsible for the strategic leadership of the volunteering service, ensuring effective leadership and delivery of its functions.

5.3 Coordinator

The Volunteer Coordinator is responsible for implementing best-practice procedures; safe, inclusive recruitment and induction; maintaining volunteer records in line with GDPR; supporting services to design meaningful roles; and ensuring clarity of roles and boundaries for volunteers and staff.

5.4 NHS Staff

Staff must understand volunteer role boundaries; support volunteers in line with policy; concerns will be escalated through local line-management or Voluntary Services Team in line with organisational governance processes; model respectful and inclusive behaviour; and work collaboratively with the Voluntary Services Team. Service managers must ensure appropriate supervision, role clarity and local induction for volunteers operating within their area.

5.5 Volunteers

Volunteers must uphold NHS D&G values; complete induction, training and supervision; follow relevant NHS policies; maintain confidentiality; act within agreed role boundaries; and raise issues or concerns appropriately.

5.6 Third Sector

Third-sector organisations whose volunteers operate within NHS settings must uphold equivalent standards of governance, safeguarding and training, in line with Clear Pathway guidance.

5.7 NHS D&G Charity

NHS D&G Charity provides funding for the Volunteering Programme and supports the organisation to ensure that charitable resources are used responsibly and in alignment with programme objectives.

6. PROCESS / PROCEDURES

The procedures accompanying this policy set out a consistent pathway covering enquiry, recruitment, selection (including PVG), induction and mandatory learning, role orientation, supervision and support, recognition and exit. They reflect NHS Scotland Volunteering Best Practice (2023–24) and ensure risk and quality are managed proportionately across all roles.

See Appendices 1–3 for detailed procedures.

7 CONSULTATION

This policy has been developed in consultation with HR, Occupational Health, Infection Prevention and Control, Health Improvement Scotland, volunteer mentors, volunteers, and service managers.

8 FUNDING

The NHS Dumfries & Galloway Volunteering Programme is funded by the NHS Dumfries & Galloway Endowment Charity. This funding enables the development, coordination and delivery of volunteering activity across the organisation, supports programme sustainability, and ensures volunteers are trained, equipped and supported in line with national standards and local service needs. NHS D&G Charity funding will be used responsibly and transparently, in accordance with governance requirements and charitable purpose.

The service will monitor financial risk, ensuring that programme delivery remains sustainable within the parameters of charitable funding conditions.

9 TRAINING AND SUPPORT

All volunteers complete mandatory induction and role-specific training, including adult/child protection, equality, confidentiality/data protection, infection prevention and control, and health, safety and wellbeing.

Volunteers will also receive training in the NHS Scotland volunteer management system (TeamKinetic), which supports digital onboarding, rostering, expenses and communication. Supervising staff receive guidance on volunteer management, boundaries, and use of the TeamKinetic system where relevant.

10. MONITORING

10.1 Arrangements

The monitoring arrangements for this Policy are set out in the table below

Element to be monitored	Monitoring Methodology	Reporting		
		Presented by	Committee	Review
Volunteering Policy	Whole policy review	Volunteer Coordinator	Board Management Team	Annual
Volunteer activity & inclusion	Volunteer hours, roles, retention & diversity indicators	Volunteer Coordinator	Governance Groups	Annual
Quality & Safety	Review of incidents, concerns, feedback & improvements	Volunteer Coordinator	Clinical Governance	Annual
Volunteer Experience	National/Local surveys	Volunteer Coordinator	Health and Social Care Partnerships (HSCP) Area Partnership Forum (APF)	Annual
Funding Requirements	Review of annual expenditure, projected future resource needs, and alignment with NHS D&G Charity funding conditions	Volunteer Coordinator	Board Management Team / NHS D&G Charity Committee	Annual

10.2 NHS Dumfries and Galloway is committed to an ongoing process of review and evaluation of this policy in consultation with all relevant parties.

10.3 NHS Dumfries & Galloway will also monitor the ongoing funding requirements for the volunteering programme to ensure sustainability and continued compliance with NHS D&G Charity governance arrangements. Funding needs, expenditure and future requirements will be reviewed annually and reported through established governance routes. *See Section 8 – Funding*

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11 EQUALITY IMPACT ASSESSMENT

NHS Dumfries & Galloway will eliminate discrimination, advance equality and foster good relations under the Equality Act 2010. The programme will proactively address participation gaps identified in national data and ensure equitable access to roles, reasonable adjustments and inclusive practice.

An EQIA has been completed for this policy. No negative impacts were identified.

12 DATA PROTECTION AND CONFIDENTIALITY IMPACT ASSESSMENT

Volunteers must comply with NHS confidentiality principles. Volunteer records are maintained securely in line with GDPR and used only for lawful purposes connected to volunteering. A Data Protection Impact Assessment was not required as this policy does not introduce new data processing arrangements.

13 DOCUMENT CONTROL SHEET

13.1 Document Amendment History

Version	Section(s)	Reason for update
1.0	Original Policy	Creation of first volunteering policy
2.0	Review	Scheduled review—no major changes
3.0	Review	Scheduled review and update
4.0	Review	No major updates required
5.0	Review	Transfer to new template
6.0 (2026)	Full Policy Review	Comprehensive modernisation with updated national data, UN typology, Clear Pathway, NHS Scotland best practice; separate third-party policy reference
7.0	Review	Minor changes to align with NHS D&G agenda
8.0	Review	Refresh of Appendices

13.2 Distribution

Name	Responsibility	Version number
Director of Allied Health Professions	Operational Management	6.0, 7.0

13.3 Associated documents

- Scotland's Volunteering Action Plan
- NHS Scotland Volunteering Best Practice Guide (HIS, 2023–24)
- Scottish Household Survey Volunteering Results 2024 (published 2025)
- UN Volunteers Volunteering Typology (2020)
- Clear Pathway Guidance (Voluntary Health Scotland, 2018)
- NHS Scotland: Out of Pocket Expenses Guidance DL (2022)
- NHS D&G Equality, Diversity and Human Rights Policy
- NHS D&G Information Security Policy
- NHS D&G Confidentiality and Data Protections Policy

13.4 Action Plan for Implementation

Action	Lead Officer	Timeframe
Maintain and update Appendix 2 – Staff Procedures for involving volunteers	Volunteer Coordinator	Ongoing / reviewed annually
Maintain and update Appendix 3 – Problem Solving Procedures for volunteers	Volunteer Coordinator	Ongoing / reviewed annually
Develop Volunteer Risk Assessment Framework	Volunteer Coordinator	Within 6–12 months
Develop Volunteer Infection Prevention & Control (IPC) Guidance aligning with IPC advice	Volunteer Coordinator	Within 6–12 months
Develop Occupational Health Guidance for Volunteer Roles (screening & fit-for-role)	Volunteer Coordinator	Within 6–12 months
Develop Volunteer Mentor Framework (roles, training, monitoring)	Volunteer Coordinator	Within 12 months
Strengthen HR-aligned conduct and escalation pathway for	Volunteer Coordinator	Within 12 months
Align all volunteering documentation with national best practice (HIS, Clear Pathway, national data)	Volunteer Coordinator	Ongoing
Disseminate updated documents and raise staff awareness	Volunteer Coordinator	Following approval
Implement updated and new procedures across all services	Volunteer Coordinator	Immediately following publication

Appendix 1 – Volunteer Procedures

1. Role and Value of Volunteering

Volunteers at NHS Dumfries & Galloway provide additional, person-centred support that enhances patient, carer, visitor and staff experience. Volunteers:

- Complement but never replace paid staff
- Bring lived experience, compassion, time and community connection
- Operate within defined roles, boundaries and supervision arrangements

Volunteering contributes to individual wellbeing, social connection, community resilience and service improvement.

2. Volunteer Lifecycle Overview

The volunteer journey follows a proportionate, safe and inclusive pathway:

1. Enquiry and initial discussion
2. Application and informal conversation
3. Selection and checks (references, PVG where required)
4. Health screening
5. Induction and mandatory learning
6. Role orientation and shadowing
7. Ongoing support, supervision and review
8. Recognition and development
9. Exit and feedback

3. Recruitment and Inclusion

- Volunteering opportunities are open to people from all backgrounds
- Reasonable adjustments will be made where possible
- Recruitment methods are inclusive and accessible
- Roles are designed around service need, safety and volunteer capability

Where a suitable role is not available, individuals will be sensitively informed and signposted where appropriate.

4. Selection and Checks

Selection is proportionate to role risk and may include:

- Informal discussion or interview
- Two references
- PVG Scheme membership
- Occupational Health screening

All information is managed securely in line with GDPR.

5. Induction, Training and Support

All volunteers complete:

- Corporate and volunteering induction
- Mandatory learning (e.g. confidentiality, safeguarding, equality, Infection Prevention Control)
- Role-specific orientation and shadowing

Volunteers receive:

- A named supervisor or contact
- Regular check-ins and support
- Access to further learning where relevant

6. Expenses and Insurance

- Approved out-of-pocket expenses are reimbursed
- Guidance follows NHS Scotland national standards
- Volunteers are covered by CNORIS (Clinical Negligence and Other Risks Indemnity Scheme) while undertaking agreed duties

7. Volunteer Responsibilities

Volunteers are expected to:

- Act in line with NHS D&G values
- Maintain confidentiality and boundaries
- Follow agreed role descriptions
- Raise concerns promptly
- Inform staff of changes impacting their role

8. Ending Volunteering

Volunteering may end:

- At the volunteer's request
- At natural role conclusion
- Following mutual agreement
- Following problem-solving processes (see Appendix 3)

Exit feedback is encouraged to support continuous improvement.

Appendix 2 – Staff Procedures for Involving Volunteers

1. Purpose

These procedures support staff to involve volunteers safely, effectively and positively.

2. Before a Volunteer Is Introduced

Managers and teams should:

- Confirm genuine benefit to patients/services
- Define clear role boundaries
- Identify supervision arrangements
- Liaise with the Voluntary Services Team

3. Working with Volunteers

Staff should:

- Treat volunteers with respect and inclusion
- Understand role boundaries
- Support volunteers day-to-day
- Raise concerns promptly via agreed routes

Volunteers must never be used to cover staffing shortages or replace paid roles.

4. Supervision and Local Induction

- Volunteers receive local orientation
- Supervising staff ensure clarity of tasks and escalation routes
- Any issues are discussed early and constructively

5. Record-Keeping and Communication

- Volunteer records are held centrally by Voluntary Services
- Staff should share relevant information appropriately and lawfully
- Volunteers should not access systems or data beyond role scope

6. Recognition and Inclusion

Staff are encouraged to:

- Thank and acknowledge volunteers regularly
- Include volunteers appropriately in team culture
- Support attendance at recognition events

Appendix 3 – Problem Solving Procedures for Volunteers

1. Principles

Problem solving for volunteers is:

- Supportive, fair and proportionate
- Distinct from employee disciplinary processes
- Focused on resolution wherever possible

2. When Procedures Apply

These procedures apply to concerns relating to:

- Capability (ability to fulfil role)
- Performance (how the role is carried out)
- Conduct (behaviour, boundaries, values)

3. Informal Resolution

Most issues should be resolved through:

- Early conversation
- Clarification of expectations
- Additional support or training
- Adjustment of role where appropriate

A brief written note should be kept.

4. Escalated Review

If concerns persist:

- The Voluntary Services Team becomes involved
- A structured meeting is held
- Actions and review timescales are agreed

5. Serious Concerns

In cases of:

- Safeguarding risks
- Serious breaches of conduct
- Safety concerns

The volunteering role may be paused or withdrawn immediately, following discussion with senior staff and HR advice as appropriate.

6. Withdrawing a Volunteering Role

If withdrawal is necessary:

- Reasons are explained sensitively
- The decision is confirmed in writing
- Alternative options are considered where appropriate

Volunteers may use NHS D&G complaint routes if they feel the procedure was not followed fairly.

7. Learning and Improvement

Themes and learning from concerns will be:

- Reviewed by Voluntary Services
- Used to improve roles, training and support
- Reported through governance routes as appropriate

