



Working with Volunteers

A GUIDE FOR STAFF

December 2016

Contents

<u>Section 1</u> Introduction - Vision statement	Page 3
<u>Section 2</u> Planning for volunteer involvement - Staff/team responsibilities - Risk, health & safety - Working with vulnerable people - Boundaries - Further training	Page 5
<u>Section 3</u> Recruitment of volunteers - Required paperwork - Recruitment process - Pre-volunteering checks - Timescales - Transferring roles	Page 8
<u>Section 4</u> Training & Induction - Corporate induction - Core training - Departmental inductions - Confidentiality	Page 10
<u>Section 5</u> Support & Supervision - Involving volunteers in decision making - Developing volunteers	Page 12
<u>Section 6</u> Dealing with issues & Exits - Handling problems - Exit interviews	Page 14
<u>Section 7</u> Further information and advice	Page 15

Section 1

Introduction

This guide is designed for those staff wishing to recruit and work with volunteers within NHS Borders. It outlines how to identify and develop volunteer roles and the processes involved in recruiting and supporting volunteers.

Volunteers work side-by-side with paid staff, complementing and adding value to their work. Volunteers can also add that personal touch, which can make the world of a difference to the patient/service user experience. In some circumstances volunteers with particular medical conditions can provide empathy, understanding and support, sharing from their personal experience and complementing services.

Volunteering is also about helping and supporting the NHS to deliver its services. Volunteers can help shape the way the service is developed and delivered and this can be achieved through volunteers participating in patient focus and public involvement activities.

NHS Borders is committed to the principles of equality and diversity in providing opportunities for members of the public to become involved in the work of the NHS. There are many opportunities for volunteers within NHS Borders.

NHS Borders recognises that the population it serves is diverse, and a volunteer's gender, age, race, disability, religion, sexual orientation, socio-economic, carer and employment status will have an impact on their needs. Even within these groupings there will be differing individual needs and it is essential to acknowledge that this diversity may impact on the needs of volunteers. Equality monitoring of volunteers will be introduced as part of the monitoring process.

Vision Statement

NHS Borders values 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 who have 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 Borders services. The Board is committed to continue to improve our volunteering processes and support the Scottish Government's NHS Scotland Strategy on Volunteering.



John Raine
Chair

NHS Borders

For further information on any aspect of volunteering please contact a member of the Public Involvement Team:

Public Involvement
Clinical Governance & Quality
Borders General Hospital
Melrose

Tel – 01896 827470

Email – public.involvement@borders.scot.nhs.uk

The handbook should be read in conjunction with:

- NHS Borders Volunteer Policy 2016
- NHS Borders Volunteer Expenses Policy for Staff
- NHS Borders Volunteer Expenses Policy for Volunteers
- NHS Borders Guide for Volunteers

These are available on the NHS Borders intranet.

Section 2

Planning volunteer involvement - What are your service users asking for?

Volunteers can support and enhance our services – they may be able to do some of the ‘if only’ things that service users would really like but that don’t fit into the remit of paid staff. Talking to your service users about the things that would really help them allows you to work together to decide if and how to involve volunteers. This, in turn, ensures that any volunteers you do recruit will become a valued part of your service and well worth the effort needed to get them, and to keep them involved.

What tasks do you want done?

The key to making volunteering successful is well thought out and designed volunteer roles that you can properly support. You may have a wide range of opportunities that you feel volunteers could usefully be involved in or you may have a very specific role in mind. In either case, write down your idea and look at how to develop it into a satisfying volunteer role – it is always helpful to do this as part of your team working to ensure their ideas and perspectives are included. It will also help everyone to understand the value of involving volunteers in your department.

You can use the *volunteer request form* to help you plan and develop the role. It will help you to identify the type of person who you are looking for, how you will develop the opportunity and to identify the type of skills and experience you require your volunteers to have or be willing to learn/develop. A *role description* should be created based on what you have included in your volunteer request form, role descriptions contain further information on the volunteer role are sent out to potential volunteers along with application forms. It is extremely important to remember that we never ask volunteers to undertake a role that was once the job of a paid member of staff. All volunteer roles must show a direct link to enhancing patient experience. If you are in any way unsure about the tasks you wish a volunteer to undertake, please seek advice from the Volunteer Coordinator.

How will you welcome volunteers into your department?

There will be a number of processes involved in establishing any new volunteer in their role and your team. Agree within your team who will take responsibility for:-

- Getting the volunteer appointed (recruitment, application and induction processes). The volunteer lead should discuss their training needs with the volunteer prior to commencing their volunteer role. Specific induction to the role should take place within the team and other training needs should be identified depending on the volunteer role.
- Ensuring the volunteer knows what is expected of them (planning their role – role description, volunteer agreement, and risk assessments).
- Identifying any training needs or additional personal support required to carry out the required tasks and provide support and supervision.
- Ensuring the volunteer is reimbursed for any out of pocket expenses. It is important to confirm in the very early stages in the planning process that your department has the funds to cover volunteer expenses. Volunteers are not reimbursed by a central budget but by individual departmental budgets.

Assessing and Reducing Risk

By encouraging volunteers to share our work, both opportunities and risks are created. Although opportunities and activities should be positive and desirable, they may contain some risk. Therefore any risk assessments for the service will extend to volunteer involvement. You should always encourage volunteers to tell someone if they feel they are being asked to do anything that makes them feel unsafe – for whatever reason, or if they feel that a service user is being put at risk. They should know who is the named volunteer lead and that person should acknowledge and deal with their concerns.

Risk Assessments should be undertaken carried out in each area to ensure volunteer/staff needs are addressed.

Health and Safety

Volunteers need to be able to carry out their duties in a way that is safe for them and safe for those they volunteer with. The Health and Safety issues relevant to each role must be explained to volunteers and they should be aware of current policies/practice guidelines designed to keep people safe in your work setting. Additional Health and Safety training required by individual volunteers will vary according to their agreed tasks.

For example, special inputs might be required on:-

- Moving and handling
- Lone working
- Supporting someone whose behaviour challenges the service
- Supporting volunteers with additional support needs

Working with Vulnerable People

Volunteers support our work/activities with service users and will often, therefore, come into contact with vulnerable people. The NHS needs to provide a safe and accountable environment for its service users, volunteers and staff.

Ensure that your volunteers have the information and training they need to carry out their role. Training is only one aspect of this. Simply spending time on introductions is also a good way of preparing volunteers, service users and other staff to work together.

The NHS has a duty to investigate any incident, event or circumstances that raises concern about the safety or wellbeing of a child or vulnerable adult. You need to inform your volunteers about this duty and how it may affect them.

Boundaries of Volunteering

Most services will have boundaries for volunteers and this should be explained as part of the volunteer's induction. Some examples of boundary issues where a little thought and planning can help avoid un-necessary problems include:-

- Phone numbers and addresses.
- Visiting clients in their own homes, unless this is an agreed part on their role.
- Money - as a general guide volunteers should not accept responsibility for any money belonging to service users.
- Personal care - volunteers should not assist service users with their personal care.
- Guidance on training for volunteers on confidentiality is available from the volunteer

lead.

Volunteer Management Training

Any member of staff that has a responsibility to manage and support volunteers can access training on volunteer management. This training is delivered jointly with Volunteer Centre Borders and NHS Borders and can be requested through the Volunteer Coordinator.

Line Managers should also consider including a reference to managing and supporting volunteers in the job descriptions of staff that undertake this additional role.

Section 3

Recruiting a Volunteer

Once you have an agreed role description you can advertise your role. Before any role can be processed, HR requires the following:

- Volunteer request / planning for a volunteer form
- ***Occupational health volunteer analysis form***
- Volunteer role description
- Advert - if the role is being advertised

The Volunteer Coordinator can provide support to develop roles and assistance with the completion of these forms if required.

When someone enquires about volunteering or offers to volunteer and you do not have any available roles in your department please direct them to the NHS Borders website or the Public Involvement Team within Clinical Governance and Quality.

If you do have a volunteer role that you are recruiting to, ensure that you acknowledge them and thank them for their interest. If the correct person they need to speak to is unavailable, ask for their name and contact details and arrange a suitable time for someone to follow up their enquiry.

The staff in your team or unit, who are responsible for volunteers should then speak to the person, explain the role, what will be required of potential volunteers and find out:-

- Whether the person has particular skills they wish to use or develop
- What the person hopes to gain from volunteering

Where a person applies to volunteer within NHS Borders and they are interested in a particular role currently being advertised, after the initial discussion about the role they should be signposted to the Human Resources department so an application form can be sent out. HR will then process applications as per the standard process. Volunteers are invited to attend an informal interview with the volunteer lead and it is their responsibility to take and check their completed Disclosure/PVG, check the forms of identification required and complete the interview checks pack. At the informal interview it is important to inform the volunteer that they will be required to complete a health screening assessment as part of the recruitment process. It should be explained to volunteers that every member of staff and volunteer are asked to complete this form and that it should be seen as a supportive tool and not a barrier to volunteering. If a volunteer feels unsure about this aspect of the process the Occupational Health team are there to answer any questions they may have. You also inform volunteers that there are compulsory training and induction sessions that they will be required to undertake, further information is contained in section 4.

Some volunteers may also require extra support and guidance to complete the necessary paperwork; the Volunteer Coordinator can provide additional support during informal interviews with regard to the paperwork if required.

If the person is deemed suitable for the role after informal interview and they are happy to proceed, HR will then undertake pre-employment checks:

1. Occupational Health Questionnaire.
2. Police Act Disclosure Application/PVG form (guidance is available on this in the specific guidance on completing Disclosure Scotland forms available from HR) sent to Disclosure Scotland for processing.

3. Request references from the persons nominated as referees on the application form.

Volunteer leads need to decide how to keep each prospective volunteer informed and engaged during this process as it can take up to 8 weeks for pre-employment checks to be processed.

Staff should flag up with volunteers any impact their volunteering may have on the social security benefits they receive. Current guidance limits volunteering to no more than 16 hours per week. The volunteer should notify the benefits agency if they are in receipt of benefits.

Explaining Disclosures & Protecting Vulnerable Groups (PVG) Applications

If the volunteer role requires a PVG or a Standard or Enhanced Police Act Disclosure to be completed, when Disclosure Scotland processes the request they send a copy of the disclosure to both the volunteer and to HR. HR then informs the volunteer lead whether the check is clear or not. If a volunteer role completes a basic disclosure, only the volunteer will receive a copy of the check, volunteers must provide us with a copy of this for HR records. If any disclosure reveals information that causes concern, invite the volunteer to meet with the lead manager and HR lead officer to discuss the situation and decide whether we can accept the volunteer's offer to volunteer with us. A clear Disclosure Scotland check does not automatically mean that a person is suitable for your volunteering opportunity. If you are unsure about someone's suitability for your volunteer opportunity please seek advice about his or her application from the Human Resource Department.

Transferring Volunteer Roles

If the volunteer would like to transfer to another volunteering role or volunteer in more than one role at a time, Disclosure Scotland checks may be undertaken again depending on the level of protection required. An Occupational Health Questionnaire will require to be completed for a new role.

Section 4

Corporate Induction

From April 2016 all new volunteers will be asked if they would like to attend the one day NHS Borders corporate induction. The corporate induction focuses on the organisational values and will provide new volunteers with a welcome to NHS Borders as well as setting out what we expect from staff and volunteers as an organisation. If any new volunteers would like to attend, volunteer leads should inform the HR department who will book places on the next available session and write out to volunteers to confirm arrangements.

Volunteer Core Training Sessions

The volunteer core training programme covers the statutory and mandatory elements that we are all required to undertake training in - Risk, Health & Safety, Infection Control, Patient Confidentiality and Public Protection. These sessions are scheduled on a quarterly basis and are managed by the Volunteer Coordinator. Volunteers must have completed this course within 6 months of starting in their roles. All volunteers are required to undergo formal refresher training in Public Protection every three years. Training can be offered through eLearning or classroom based depending on individual circumstances.

Departmental Inductions

You should also arrange for the volunteer to receive appropriate local departmental induction and identify any additional training requirements needed for the specific role. Volunteer Leads should refer to and complete the *volunteer induction checklist*. Arrange for the volunteer to meet the staff who will support them and the service users with whom they will work (provided that the service users agree and the volunteer is always supervised). Patients should always be aware if volunteers are involved in any way with their care/support provision and have the right to refuse their involvement.

Volunteers should not start in their role until all the pre-employment checks have been completed but they can take part in induction and training sessions.

Confidentiality

All volunteers must have the NHS Borders Policy on Confidentiality explained to them and sign a *confidentiality agreement* before commencing their placement. Volunteer leads should ensure that confidentiality statements are signed off every 2 years. Volunteers should be encouraged to discuss any concerns or queries.

In a situation where the volunteer has been given information as 'a confidence' or as a 'secret' they should explain that any information they receive may have to be shared with their volunteer lead. Volunteers may require additional support in this aspect. Staff are responsible for the well-being of all the individuals within their service and volunteers should not be left feeling they are carrying the burden of disclosed information. This is for the safety and well-being of the service user and the volunteer.

Volunteer Expenses

Expenses must be agreed by the department budget holder prior to the volunteers starting. Where it is agreed that a project fund will pay the volunteer expenses directly, the process must be explained and appropriate forms provided. There is national guidance on volunteer expenses that should be followed and adhered to at all times.

Reimbursement of expenses should be as prompt and as easy as possible for volunteers. Staff need to think how they can make sure this happens. It is important to talk to individual volunteers about how best to pay their expenses.

Items that should be claimed include:-

- Travel to and from place of volunteering (excluding travel beyond the boundaries of NHS Borders).
- Travel in the course of volunteering.
- Subsistence allowance, e.g. refreshment costs where the volunteering has been in excess of five hours (unless other arrangements agreed in advance).
- Changes to motor insurance policies required when volunteers need to use their own car in direct connection with their volunteering.

Where it has been agreed that the volunteers' expenses will be paid through the NHS Borders, volunteers must use the standard volunteer expenses claim form. This can be found in the *expenses policy*. You should also ensure that the volunteer completes the bank account details form and this is sent to the Finance department.

To make volunteering as accessible to all people staff should ensure volunteer expenses should be paid as soon as possible. Staff should recognise that volunteers will often find it hard to 'chase' expenses and should be proactive in ensuring they are paid in a timely fashion.

Volunteers' Personal Effects

It is important to note that NHS Borders cannot be responsible for volunteer's personal effects while they are volunteering. Volunteers should make every reasonable effort to limit the number of valuables brought in and to ensure that their essential personal effects are stored in a safe place e.g. a locked desk or cupboard.

Information about Volunteers

The NHS recognises its responsibility towards volunteers concerning personal information given by the volunteer to the team. Any decision to share such information with other staff or service users should always be made on the basis of what they actually need to know and also with the knowledge and consent of the volunteer.

Section 5

Support and Supervision for Volunteers

You should arrange regular support and supervision for volunteers to assess their general competence, how they develop relationships with staff and service users, and to identify their training needs. A *volunteer review form* is available to assist you with carrying out regular reviews with volunteers.

The aims of supporting volunteers are to:-

- Encourage their development in their volunteering activity
- Maintain their involvement in voluntary activity within the NHS
- Enhance the quality of service provision
- Improve the patient experience
- Ensure they are valued as part of the team

Support is continuous and takes many forms. Volunteers are supported when they are given:-

- ✓ A warm welcome
- ✓ Information about the service/department/team they are working with
- ✓ A named volunteer lead who will be available to provide support/guidance/supervision
- ✓ Periodic review of their role
- ✓ A clearly written description of their role
- ✓ Induction/training which helps them to acquire the knowledge and skills to accomplish the tasks involved
- ✓ Reimbursement for out of pocket expenses
- ✓ Recognition of their contributions

Support and supervision is an important component of support for a volunteer. It also has a function as an organisational mechanism for monitoring the standard of a volunteer's role. A member of staff who accepts responsibility for supervising a volunteer (volunteer lead) should be sure that they will have time to do this.

Developing Volunteers

Good volunteer development means getting it right for each individual volunteer – volunteers come from a wide variety of backgrounds and have individual needs. To build a strong and vibrant volunteer service, we should aim to provide a structure in which all our volunteers:-

- ✓ Feel valued
- ✓ Understand their reasons for volunteering
- ✓ Understand what helps them to feel involved and engaged

It is recommended that every 6 months a review with the volunteer and volunteer lead takes place. This will allow the volunteer to reflect on their experience, think about the volunteering they do and give them the opportunity to review their involvement.

Involving Volunteers in NHS Borders Decision Making

Volunteers should have the same opportunities as paid staff to contribute to the decision making within NHS Borders. The volunteer lead should ensure that volunteers have the opportunity to have their views heard in any consultations that are ongoing. Volunteers should also be encouraged to make comment and raise issues with NHS Borders services. The volunteer lead should ensure that these views are fed into the most appropriate decision making channels.

Section 6

Handling Problems with Volunteers

You must explain to your volunteers that they are volunteering with a statutory agency and we have a legal responsibility to maintain standards of practice, which determines how we deal with problems. Your team should plan in advance how you will manager any possible future problems with volunteers.

If a volunteer has a concern about their volunteering or someone else has a concern about a volunteer or the services they provide, refer to the Volunteer Policy for relevant procedures.

Whilst NHS Borders recognises the valuable addition volunteers make to the services it provides, it is important to ensure that the quality of help matches the standards required by the NHS.

As a matter of course the volunteer lead supporting a volunteer will meet regularly with them and be aware of the volunteer's role, providing opportunities for discussion and guidance on good standards of practice. This approach should enable any difficulties arising to be addressed at an early stage.

Criminal Proceedings

If a volunteer is subject to any criminal proceedings, they must notify their Volunteer Lead immediately. NHS Borders reserves the right to request an up to date Disclosure check at any time.

Exit Interviewing

It is good practice for volunteers to be offered to share their thoughts and experiences when leaving NHS Borders. The volunteer should be given the opportunity to undertake an exit interview with their volunteer lead or a nominated representative from HR. An *exit interview form* is available to capture volunteer feedback.

If you require any further guidance, assistance of clarification of any of the above please contact the Human Resources Department or the Public Involvement Team.

We hope you enjoy working with volunteers and find it an enjoyable and rewarding experience.

All documents highlighted can be found on the volunteering page on the NHS Borders intranet site along with further volunteering information.

Section 7

Further Information and Advice

Joanne Forrest
Volunteer Coordinator
Clinical Governance & Quality
Borders General Hospital

01896 826700
joanne.forrest@borders.scot.nhs.uk

Sharon Purves
HR Advisor – Resourcing
Human Resources Department
Borders General Hospital

01896 826154
sharon.purves@borders.scot.nhs.uk

For more information on local volunteering opportunities please contact Volunteer Centre Borders on:

First Floor
Riverside House
Ladhope Vale
Galashiels TD1 1BT
0845 602 3921
enquiries@vcborders.org.uk Monday - Friday 10.00am - 2.00pm

For national advice, best practice guides and all the latest developments please contact Volunteer Scotland on:

Volunteer Scotland
Jubilee House
Forthside Way
Stirling
FK8 1QZ
Telephone: 01786 479593
E-mail: vds@vds.org.uk

