




NHS Borders Volunteering Policy

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1. Introduction

Volunteers make a key contribution to the life and work of NHS Borders and the wider community it serves. A volunteer is defined as:

“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, Scottish Government 2008).

Volunteers may be recruited directly or indirectly through voluntary organisations. Volunteers help to deliver services and work side by side with paid medical staff, nursing staff, support staff and allied health professionals, complementing, not replacing, their work and enhancing the services we provide.

Volunteering brings a wide range of benefits to patients, carers and service users and to the volunteers themselves. For patients / service users, volunteers can offer social support, experience, time and attention. For Scotland’s NHS and its staff, volunteers can help to free up professional resources and forge stronger links with local communities. For volunteers the experience can provide purposeful activity, a sense of belonging, social interaction and be good for their own health and well being.

There is a diverse range of volunteers within NHS Borders who contribute in a variety of ways. NHS Borders values the role of volunteering within the health board and recognises the valuable contribution they make.

2. Refreshed Strategy on Volunteering

NHS Borders has a volunteering policy that reflects the Scottish Government’s Refreshed Strategy for Volunteering in the NHS Scotland CEL10 (2008). The strategy requires all health boards to:-

- Provide clarity about what constitutes volunteering in Scotland’s NHS
- Ensure effective leadership in volunteering
- Plan for continuous improvement in volunteering management
- Create a positive and consistent environment for volunteering
- Develop a modern, dynamic and robust infrastructure for volunteering
- Broaden the range of people involved in volunteering
- Measure the impact of volunteering and shared learning

3. Purpose

In issuing this Volunteering Policy, we:-

- Acknowledge, support and value the role of volunteers
- Set out the principles governing the involvement of volunteers and provide a set of procedures to ensure good working practice
- Define the roles, rights and responsibilities of NHS Borders and of its volunteers
- Recognise that the role of volunteers within NHS Borders is complementary and enhances our services and does not substitute the role of paid staff
- Recognise that volunteering can benefit the health and wellbeing of the individual volunteer and has real benefits to the local community
- Encourage and enable the involvement of volunteers from all sections of the community

The Volunteering Policy and accompanying guidance and procedures are intended primarily for the use of NHS Borders employees and volunteers. A commitment to the principles contained within them would also be expected from voluntary organisations whose volunteers provide help within NHS Borders. However, NHS Borders respects the independence of these voluntary organisations and recognises that they are responsible for the management of their volunteers.

NHS Borders recognises the diversity of the population and the differing individual need of different sections of the Borders community. It is essential to acknowledge that this diversity may impact on the needs of volunteers and the visible and invisible barriers people may encounter. NHS Borders will act on these needs to ensure fair and equal access to volunteering by working in an inclusive manner, considering and valuing all potential and actual volunteer contributions.

4. Scope

Alongside the many people who volunteer in our health service there is a growing number and range of individuals who contribute in a voluntary capacity to our Patient Focus and Public Involvement agenda as formal members of a statutory forum on patient councils, networks, groups, or attending committees. This policy also broadly applies to all those people, while acknowledging that such groups may be subject to separate guidance from the Scottish Government.

In the event of an infection outbreak, Covid-19 pandemic or major incident, the Board recognises that it may not be possible to adhere to all aspects of this policy. In such circumstances, staff should take advice from their line manager and all possible action must be taken to maintain ongoing volunteer, patient and staff safety.

Aims and Objectives

NHS Borders has a Strategic Improvement Plan, the main strategic aims are:

- Provide a Volunteer Service which is safe and fit for purpose
- Provide a Volunteer Service that is effective and meets the needs of Patients and the Service
- Provide a Volunteer Service that is person-centred

NHS Borders will maintain and develop relationships with the community and third sector in the Scottish Borders encompassing:

- Voluntary organisations providing services
- Partnerships with voluntary organisations to provide services within the NHS
- Community planning partners, including educational establishments

5. Management, Monitoring & Evaluation (refer to Appendix 1 for roles and responsibilities)

The Strategic Lead for Volunteering and Voluntary Services Manager are responsible for establishing appropriate arrangements for developing and reviewing this policy.

Operational responsibility for volunteers will rest with the service that engages them appointing a volunteer lead to support; corporate governance responsibility lies with the Board and responsibility for recruitment processes lies with the Voluntary Service Manager and Human Resources Department.

The Volunteer Steering Group meets three times per year to oversee, monitor, evaluate and steer the NHS Borders volunteering programme. This group provides an opportunity to share experiences and volunteering developments, offer support and guidance and ensure the organisational standards for volunteering are maintained together with any recommendations from the Scottish Government implemented.

NHS Borders ensures volunteers' personal information is only accessible to authorised people. Volunteering information is stored on the Volunteering Information System (VIS) and our staff have a legal and contractual duty to keep personal information secure and confidential.

6. The Role and Value of Volunteering

NHS Borders recognises, values and supports the role that volunteers play in the work and culture of NHS Borders. All volunteer roles have a written role description and risk assessment carried out for the tasks that the volunteer would be expected to undertake. This will ensure that all appropriate steps are taken to provide a safe volunteering placement.

Safeguarding our volunteers is of the utmost importance, for this reason risk assessments are undertaken and training is provided and refreshed every 3 years.

7. Recruitment and Selection

NHS Borders has a duty of care for all volunteers deployed within NHS settings to minimise any potential concerns over the safety and protection of patients, staff and volunteers themselves. The Lampard report highlighted the need for Health Boards to regulate and monitor volunteering whether this be direct (recruited to the NHS) or indirect (via another third sector organisation) to ensure the safety and security of the people we support and the volunteers themselves.

NHS Borders will:-

- In line with HR policies and related Scottish Government / best practice guidance, recruit volunteers from all sections of the community. Volunteers will not be able to commence their volunteering placements until all recruitment checks are cleared which include: Disclosure Scotland check appropriate to the level of the volunteering role being carried out; NHS Borders Occupational Health screening; references approved.
- Acknowledge the importance of social inclusion and recognise that all prospective volunteers have something of value to offer.
- Place volunteers in accordance with appropriate volunteer recruitment and selection procedures, volunteer placements will be defined by the needs of NHS Borders and its service users.
- Make all reasonable effort to find suitable placements for those who offer their time and energy. Where there is no suitable placement, the volunteer will be informed of the reasons and redirected, where appropriate, to another agency such as the Borders Volunteer Centre.
- If a 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.
- Where appropriate, create new roles to utilise the individual skill set a volunteer can bring.

8. Information and Training

NHS Borders will:-

- Provide volunteers with induction and training in the specific tasks to be undertaken, core statutory and mandatory training and ongoing opportunities for learning and development.
- Ensure that volunteers are given the same opportunities as staff to contribute to the decision-making processes of the team and NHS Borders.
- All volunteers are required to undergo formal refresher training every three years. Training can be offered through eLearning or classroom based depending on individual circumstances.
- Volunteers will have the opportunity to have immunisations recommended by the Occupational Health department.
- Ensure that volunteers receive full information about their area of volunteering and their responsibilities to NHS Borders. This will include information about problem solving procedures for volunteers and about their rights and responsibilities if something goes wrong.

9. Support and Supervision

Volunteers will be assigned a volunteer lead for supervision and support, and will be given clearly specified lines of accountability. Support sessions will be provided regularly giving opportunities to discuss the volunteering placement.

When reporting an adverse event the reporting procedure for all NHS Borders staff will be used for volunteers. A staff member will require to log the adverse event report on the reporting system (Datix) on behalf of the volunteer and inform the Voluntary Services Manager.

Risk assessments, where indicated, will be completed with all volunteers' to ensure that their individual support needs can be addressed wherever possible. Health and wellbeing of volunteers is of critical importance to NHS Borders. Risk assessments should take into account any health and wellbeing needs and remain under regular review should any circumstances change which may affect the volunteer's role.

It is important that volunteers follow the same policy guidance on infection control as NHS Borders employees. Volunteers are advised of infection control guidance during their induction. If there are any issues around infection control during volunteering the volunteer lead will raise this with their Volunteer Lead / Voluntary Services Manager who will liaise with the Infection Control Team.

10. Expenses and Insurance

NHS Borders will ensure that:-

- There is a clear, consistent, accessible and equitable system for claiming reasonable out-of-pocket expenses. The system conforms to Scottish Government Guidance on the Reimbursement of 'Out of Pocket' Expenses CEL (23) 2011. This includes 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).
- Individual wards / departments have the responsibility of processing and authorising volunteer travel expenses to ensure prompt payment.
- NHS Borders is a member of Clinical Negligence and Other Risks Indemnity Scheme (CNORIS), volunteers are adequately covered by insurance whilst they carry out their agreed duties both on NHS Borders premises and in the community.
- Volunteers are given information on other legislation and policies e.g. Health and Safety, which may affect them and will be treated in the same way as staff for liability purposes.

11. Organisational Expectations of Volunteers

Volunteers are expected to:-

- Participate in induction sessions and training/refresher training relevant to their volunteering roles and placements.
- Comply with all NHS Borders policies and procedures, particularly in relation to Confidentiality, Adverse Event Reporting, Health and Safety, Infection Control, Disclosure Scotland and Occupational Health.
- Comply with NHS Borders Behavioural Framework which defines the behaviours expected of our staff and volunteers in delivering the organisational values of Care and Compassion; Dignity and Respect; Openness, Honesty and Responsibility; and Quality and Teamwork.
- Undertake their volunteering at agreed times.
- Inform the volunteer lead, as soon as possible, if they are unable to attend, and if possible in advance.
- Give notice if unable to continue volunteering.
- Raise any issues of concern relating to their volunteering with their volunteer lead.
- Be able to commit to volunteer with NHS Borders for a minimum of 6 months
- 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.

12. Relationship with NHS Borders Employees

NHS Borders is committed to ensuring that:-

- The activities/role of volunteers compliments the work of our employees and will not be used as a substitute for paid work. Volunteers are not asked to take on tasks formerly undertaken by employees or to work in ways which facilitate a decrease in paid employment.
- Volunteers are not asked to do the work of paid staff during times of industrial action, however at such times they may continue with their regular duties.
- Steps are taken to ensure that staff at all levels 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.
- The safety and wellbeing of NHS Borders patients and staff is paramount. The standard of care and conduct of volunteers should be of the same high quality as that of employees to ensure this, risk assessments are completed as required and volunteers must complete appropriate safety training.

13. Relationships with Third Sector Voluntary Organisations

Strategic guidance for NHS Boards on best practice in working with third sector partners to engage volunteers in NHS settings was formally published by Voluntary Health Scotland In April 2018. This strategic guidance (Clear Pathway) for NHS Boards concerning the management of volunteers deployed in NHS settings who are not directly recruited, managed or trained by NHS Boards. It is designed to support Boards to manage the risks and capitalise on the opportunities associated with third sector volunteering so that it is always safe, effective and person-centred, in line with the quality ambitions of NHSScotland.

NHS Borders recognises that voluntary organisations providing a service to the NHS with their own identities and values, however, NHS Borders expects voluntary organisations to adopt similar standards in the recruitment, selection and training of volunteers. Individuals who volunteer with these organisations should be subject to the same level of vetting as individuals who volunteer with NHS Borders directly. A Service Level Agreement is drawn up so that both the voluntary organisation and NHS Borders will be agreed on the standards expected.

We will aim to work with the third sector in a consistent way and learn from their wealth of experience of working with volunteers.

14. Encouraging Staff Volunteering

NHS Borders will develop a policy for NHS Borders employees volunteering which support its employees who are involved in volunteering and will:-

- Increase employees' awareness of volunteering opportunities through advertising within NHS Borders staff bulletins, website and promotional literature.
- Acknowledge the value of employees' volunteering activity, and the development opportunity it represents.
- Consider access to help in kind, for employee volunteers, for example premises, use of equipment.

15. Volunteering Procedures and Guidance

- 1) Volunteering Policy
- 2) Volunteering in NHS Borders: A Guide for Volunteers
- 3) Volunteering Application and Equal Opportunities Form
- 4) Volunteering in NHS Borders: A Guide for Staff
- 5) Volunteering Confidentiality Agreement
- 6) Volunteer Request Form
- 7) Volunteer Occupational Health Analysis form
- 8) Process for Engaging Volunteers
- 9) Volunteer Expenses Policy (staff)
- 10) Volunteering Expenses Policy (volunteers)
- 11) Volunteer Evaluation Form
- 12) Risk Assessment Template (staff)
- 13) Induction Form (staff)
- 14) Record of Discussion Template
- 15) Process - A Complaint is made against a volunteer (staff)

16. Equality Impact Assessment

The NHS Borders Volunteering Policy (this one) has been Equality Impact Assessed.

17. Additional Information

Scottish Government Volunteering Strategy

Refreshed Strategy for Volunteering in Scotland. Scottish Government CEL (10) 2008.

https://www.sehd.scot.nhs.uk/mels/CEL2008_10.pdf

Scottish Government Volunteer Expenses

Guidance on Reimbursement of 'Out of Pocket' Expenses for Volunteers within NHS Scotland. Scottish Government (CEL) 23 2011

https://www.sehd.scot.nhs.uk/mels/CEL2011_23.pdf

Clear Pathway

Strategic guidance for NHS Boards on best practice in working with third sector partners to engage volunteers in NHS settings

https://vhscotland.org.uk/wp-content/uploads/2018/07/Clear_Pathway_Guidance_April_2018.pdf

Lampard Report

Report publishing investigations into the activities of Jimmy Savile relating to the NHS.

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/407209/KL_lessons_learned_report_FINAL.pdf

18. Appendix 1

Roles	Responsibilities
NHS Borders Board	<ul style="list-style-type: none"> • Committed to continue to improve NHS Borders volunteering programme and support the Scottish Governments NHS Scotland Strategy on Volunteering • Ensure volunteers are managed in accordance with local policy
Executive Lead for Volunteering	<ul style="list-style-type: none"> • Overall governance of NHS Borders volunteering programme • Promoting volunteering at Board level
Strategic Lead for Volunteering	<ul style="list-style-type: none"> • Communication and engagement with the National Group and Volunteering in NHSScotland Programme • Contribution to the development of National Strategy for Volunteering in Health and Social Care • Escalation of important issues to the Executive Lead • Influencing local strategy in keeping with National Policy and in support of local priorities to enhance patient experience • Sharing and developing local practice to support the development of volunteering across health and social care and across NHS Scotland
Voluntary Services Manager	<ul style="list-style-type: none"> • Operational delivery of volunteering programme • Development and implementation of NHS Borders policies and procedures in keeping with national policies and guidance • Development and implementation of systems and processes for effective recruitment, training, induction and supervision of volunteers • Advisory and support role to volunteer leads in carry out their responsibilities to volunteers • Contribute to and benefit from sharing of practice through the National Volunteer Managers Network and the Community of Practice • Investigating and designing volunteering opportunities to enhance patient experience
Volunteer Leads	<ul style="list-style-type: none"> • Recruit, induct, support and supervise volunteers ensuring they adhere to NHS Borders policies and procedures • Risk assessment of individual volunteers to ensure safe systems of working for volunteers • Monitoring of volunteer hours and authorisation of expenses • Support Voluntary Services Manager with operational delivery of volunteering programme
Volunteers	<ul style="list-style-type: none"> • Adhere to all NHS Borders Policies and Procedures including NHS Borders Behavioural framework • Inform Volunteer Lead / Voluntary Services Manager of any concerns relating to their role

