A Guide for Staff Working with Volunteers
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Introduction

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

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 Lothian 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 Lothian.

You can obtain further information about opportunities and resources from the Voluntary Services Manager (VSM) for your area on the intranet http://intranet.lothian.scot.nhs.uk/Directory/InvolvingPeople/Volunteering/Pages/For%20Staff.aspx.

Comments and suggestions are also welcome. For further information please contact: Volunteer.Enquiries@nhslothian.scot.nhs.uk

Planning volunteer involvement

What are your service users asking for?
Volunteers can support and enhance our many services – they may be able to do some of the ‘if only’ things that service users would really like but that do not 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 be become a valued part of your service and well worth the effort needed to get them, and to keep them involved.

What 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. You can use the volunteer request form (appendix 1) and/or the format for planning a volunteer role (appendix 2) to help develop this process. 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 and the support that your area will give the volunteer(s).

How will you welcome volunteers into your area?
There will be a number of processes involved in establishing any new volunteer in their role and your team. Agree with your VSM who will take responsibility for:

- Developing a role descriptor with your VSM. It is important that does not replace staff. The descriptor will include the skills the volunteer might need and the training they might need along with the core induction that all volunteers complete. All new roles are discussed with HR and Partnership colleagues.
- Getting the volunteer appointed (recruitment, application and induction processes). The volunteer will undergo the NHS Induction. Specific induction to the role should take place in department/local area
- Ensuring the volunteer knows what is expected of them (planning their role, 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 out of pocket expenses

Support and supervision for volunteers
The aims of supporting volunteers are to:

- Encourage their development in their volunteering activity
- Maintain their involvement in voluntary activity within NHS Lothian
- 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 team they are working with
- A named supervisor/member of staff who will be available to provide support/guidance/supervision
- Regular review of their role – after 4 weeks, after 3 months and annually thereafter.
- A clearly written description of their role
- Induction/training which helps them to acquire the knowledge and skills to do the tasks involved and ensures that the volunteer finds the role rewarding
- Reimbursement for out of pocket expenses
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 work. This includes reminding them of updating their learn-pro elearning when prompted to do so. A member of staff who accepts responsibility for supervising a volunteer should be sure that they will have time to do this. The VSMs are available to offer advice and support to staff involved in such work.

**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 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. You may need to carry out a risk assessment to ensure this process meets the needs of the service and volunteer.

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. See the section; Handling Problems, for more details or refer to Health and Safety and Risk Management.

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. We ask our volunteers to provide references to confirm their suitability for the roles we ask them to perform.

Volunteers are also asked to disclose any criminal conviction or any criminal charges pending against them and are required to complete a Disclosure Application at the time of application. Volunteers will normally be from 16+.

**Confidentiality**
All volunteers must have the NHS Policy on Confidentiality explained to them and sign a confidentiality statement before commencing their placement. Completing the Information Governance learnpro module is part of the core induction that all volunteers complete. Volunteers should be encouraged to discuss any concerns or queries with an appropriate member of staff.

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 staff. Volunteers may require additional support in this aspect.

Staff are responsible for the well-being of all the individuals involved within an area 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.
Information about volunteers
The NHS recognises its responsibility towards volunteers concerning personal information given by the volunteer to the VSM. 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.

Boundaries of volunteering
Most roles will have boundaries for volunteers and this should be explained as part of the volunteer’s induction. Volunteer role descriptions are useful here, as these can help people to be clear about what a volunteer is doing and why, and should be up-dated and developed as necessary. Some examples of boundary issues where a little thought and planning can help avoid unnecessary 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 are asked not to accept responsibility for any money belonging to service users
- Personal Care. Volunteers are not expected to assist service users with their personal care.
- Guidance on training for volunteers on confidentiality is available from the VSM.

Volunteer expenses
Expenses must be agreed by the VSM prior to the volunteers starting. Where it is agreed that a particular project fund will pay the volunteer expenses directly, the process must be explained and appropriate forms provided.

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 Lothian).
- Travel in the course of volunteering
- Refreshment costs where the span of duty has been in excess of four hours

Where it has been agreed that the volunteers’ expenses will be paid through the NHS, volunteers must use the standard volunteer expenses claim form and be signed by someone who has worked with the volunteer in the area before sending to the VSM.

Volunteers’ personal effects
NHS Lothian 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.

**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 area 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 additional inputs might be required on:

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

**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 area 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 support person and that person should acknowledge and deal with their concerns.

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

**Recruiting a volunteer**

First impressions are important. When someone enquires about volunteering or offers to volunteer, ensure that you acknowledge them and thank them for their interest. If the VSM or the area staff are not available to speak to the person immediately, ask for their name and contact details and arrange a suitable time for someone to follow up their enquiry.

The VSM or staff member on your team or unit who is responsible for volunteers should then speak to the person and find out:

- ✔ What the person is interested in doing
- ✔ What the person hopes to gain from volunteering
- ✔ Whether the person has particular skills they wish to use or develop.

Advise the person about opportunities for volunteers in your area.

Volunteers do not help with:
- Patient personal care; taking people to the toilet
- Moving and handling, unless a volunteer has undertaken wheelchair training
• Using confidential data and records

• Changing bed linen, cleaning work

• Answering the ward telephone or engaging in administrative duties unless this is specifically part of their agreed volunteer

The handbook for volunteers with fuller information is available on the intranet.

**Recruitment and induction of volunteers**

The VSMs can offer advice and support about the initial stage of recruitment.

Applicants wishing to volunteer must obtain Protection of Vulnerable Groups (PVG) (also known as Disclosure Scotland) and Occupational Health clearance before being considered for formal interview with a Volunteer Manager. Successful applicants must then complete NHS Lothian induction and training prior to commencing their activities. This includes:

• Eating, Drinking and Food Hygiene (if relevant)
• Equality and Diversity
• Fire Safety
• Health and Safety
• Healthcare Associated Infection
• Information Governance
• Management of Aggression
• Manual Handling (non patient)
• Public Protection

The handbook for volunteers is

**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

You should encourage your volunteers to think about the volunteering they do and give them the opportunity to review their involvement. Some areas will provide additional specific information to volunteers.

**Training**

• All volunteers must complete the required Learnpro modules prior to local induction. After their induction into your area, your volunteers may need additional information or training to perform their agreed role.
Training can take many forms. Please contact the VSM if you need help to identify or provide appropriate training to your volunteers.

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.

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 Lothian 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 member of staff 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.

If you require any further guidance, assistance of clarification of any of the above please contact your VSM.

We hope you enjoy working with volunteers and find it an enjoyable and rewarding experience.
Appendix 1

VOLUNTEER REQUEST FORM

Contact Name/Department: ………………………………………………………………………………………………
Telephone Number: ………………………………...……………… Ext No: ………………..
Volunteers Post Description ……………………………………………………………………………………………
Number of Volunteers Required: ……………….  Starting Date(s): ………………………..
Volunteer(s) is/are required (days/times)

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Location of Volunteer Post(s): ……………………………………………………………………………………………
Description of Volunteer Post(s): ……………………………………………………………………………………………
………………………………………………………………………………………………………………
………………………………………………………………………………………………………………
Qualities/skills/experience required of volunteer(s):……………………….………………………..…
………………………………………………………………………………………………………………
Please give details of training and support supplied: ……………………………………………….
…………………………………………………………………………………………………………….
…………………………………………………………………………………………………………….
Are your premises suitable for disabled volunteers? Yes ☐ No ☐
Would the volunteer be volunteering on their own? Yes ☐ No ☐
Would the volunteer/s be volunteering as part of a team? Yes ☐ No ☐
Do you have a budget for “out of pocket” expenses? Yes ☐ No ☐

Any further details which you consider relevant? …………………………………………………
………………………………………………………………………………………………………………
………………………………………………………………………………………………………………

Signature: ……………………………………..………………….  Date: ………………

Please return completed forms to your local VSM
Appendix 2

PLANNING A VOLUNTEER PLACEMENT FORM

Name of area ………………………………………………………………………………………………………

What will you call this volunteering placement? …………………………………………………………

To whom will the volunteer be accountable? ……………………………………………………………

Who will regularly supervise and support the volunteer? …………………………………………………

What are the benefits of this volunteer placement? ……………………………………………………

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What do you want the volunteer to do?

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Where will the volunteer be based? ………………………………………………………………………

What time commitment do you want from the volunteer?

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What skills, knowledge, qualities or attitudes does the volunteer need to do the tasks?

…………………………………………………………………………………………………………………

What training is necessary and available to the volunteer?

…………………………………………………………………………………………………………………

What other requirements do you have?

…………………………………………………………………………………………………………………

…………………………………………………………………………………………………………………

…………………………………………………………………………………………………………………

Signature: ………………………………………………………………… Date: …………………

Please return completed forms to your local VSM