

This procedure outlines the processes for the management of volunteer conduct or performance.

NHS Lothian is committed to promoting fairness, consistency and transparency in the management of volunteer conduct. This will be achieved by;

- Clarity in the communication of conduct expectations for volunteers
- Regular support and communication to monitor adherence to agreed expectations
- A clear process by which situations where volunteer conduct fails to reach the levels expected is managed

Where ever possible NHS Lothian seeks to resolve issues with volunteers informally, through the provision of support but there are occasions when formal processes will be required.

Communication of conduction expectations for volunteers

NHS Lothian will communicate expectations for conduct to volunteers in a variety of ways;

- Through adverts and promotional material which will reflect NHS Lothian's values and clearly outline time commitments, and broad behavioural requirement
- Through role descriptions which will detail the role, tasks and quality expectations
- At interview when detailed discussion will take place about values and attitudes and expectations
- Through induction training when there will be further detailed discussion about expectations, values, attitudes and behaviours. The exercises and discussions will be supported by handouts to take away and keep.
- At placement discussion where engagement with the induction material will be discussed and key concepts revisited
- At local induction when the detail of the role description and expectations including dos and don'ts, practical details and support will be discussed
- Through the signing of the volunteer agreement which details expectations

Regular support and on-going communication

On-going support and communication about conduct expectations will take many forms;

- One to one support – from VSM or Volunteer Ambassador
- Group support, training and peer learning events
- e-bulletins, newsletters, text and email
- Feedback from placement staff – to VSM and direct to volunteer
- Attendance monitoring

Process to manage situations where volunteer conduct fails to reach the levels expected

Informal process

Most issues can be resolved by informal discussions, before taking formal disciplinary steps we would seek to resolve the issue informally.

Where minor problems in conduct or performance are observed or alleged such as;

- Poor time keeping
- Poor performance
- Minor inappropriate behaviour (where no injury or harm results and no malice is intended) e.g. occasional bad language, body odour, mobile phone usage, etc.

In these circumstances the Voluntary Service Manager will invite the volunteer to meet with them. At this meeting the Voluntary Service Manager will outline the concerning conduct in a sensitive but clear way, giving specific examples. At the meeting the Voluntary Service Manager and volunteer will discuss the issue and agree a time bound plan for improvement.

Following the meeting the Voluntary Service Manager will summarise the key points of the discussion and agreed action points in writing. These notes will be stored on the server in the volunteers folder and be shared by email or post with the volunteer. Any factual inaccuracies in the notes can be amended at the request of the volunteer and situations where there is not a factual inaccuracy but a difference of opinion the volunteers opinion will be recorded alongside that of the Voluntary Service Manager.

If there is no improvement following the agreed time frame the following options are available and will be discussed at a second meeting between the Voluntary Service Manager and Volunteer;

- Reasonable changes to the placement/role to enable the volunteer to carry it out
- A change of placement or role where appropriate and available
- An additional time bound improvement plan to address issues
- Formal procedure

Formal procedures

Where there is a more serious issue or where there is no improvement in relations to issues previously addressed informally formal procedures will be used.

Examples of more serious incidents include but are not limited to the following;

- Being unfit for volunteering through illegal drugs or alcohol
- Theft
- Fraud or deliberate falsification of documents
- Breaching confidentiality
- Harassment or bullying
- Violent or aggressive behaviour
- Gross negligence

- Gross insubordination

In these situations the volunteer will be informed in writing of the issues raised as a concern (this may be verbally and then in writing where appropriate) and in some incidences may be suspended from role. At this time a member of the Voluntary Service Team will be appointed to investigate the issues. The volunteer will be informed of who this is during this initial communication.

Once the investigation is completed (this will be done as swiftly as possible but may take up to four weeks depending on the complexity of the situation and number of individuals involved) a review meeting will be scheduled. The review meeting will be attended by the investigating member of the Voluntary Service Team and the Voluntary Service Manager for the site, the volunteer and the volunteer may bring a representative or support if they wish.

At the meeting the findings of the investigation will be shared with the Voluntary Service Team member who lead the investigation reporting if they uphold the allegations. The following are possible outcomes of an investigation;

- No action – if allegations are not upheld
- Formal warning – accompanied by clear expectations of future conduct
- Formal warning – accompanied by clear expectations of future conduct, time bound improvement plan and review date and an indication that if improvement is not achieved then the placement will be terminated at the review meeting
- Termination of placement with immediate effect (written confirmation to follow)

Appealing the outcome of a formal procedures

Volunteers may appeal any formal action taken under the formal procedures. To do that the volunteer must put in writing their grounds for appeal to the Deputy Director of Corporate Nursing within a week of receiving written notification of the outcome of the investigation and the resulting action.

The Deputy Director of Corporate Nursing's decision is final.

Associated materials/references:

- Volunteering in NHS Lothian Policy
- Volunteer Role Procedure
- Volunteer Recruitment Procedure
- Volunteer Performance Management Procedure
- Volunteer role description template
- Volunteering Well – NHS Lothian Volunteering Strategy 2018-2023
- Volunteer Induction Training Materials