### Policy Checklist

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<th>Volunteer Policy and Procedures</th>
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<tr>
<td>Directorate responsible for Policy:</td>
<td>Older People &amp; Primary Care</td>
</tr>
<tr>
<td>Name &amp; Title of Author:</td>
<td>Gerardette McVeigh, Kate Johnston &amp; Imelda McPolin Volunteer Co-ordinators</td>
</tr>
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<td>Trade Union consultation?</td>
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<tr>
<td>Equality Screened by:</td>
<td>Gerardette McVeigh, Kate Johnston &amp; Imelda McPolin Volunteer Co-ordinators</td>
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<td>16 June 2014</td>
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<tr>
<td>Members of Policy Scrutiny Committee in Attendance:</td>
<td>Vivienne Toal, Head of Employee Engagement &amp; Relations (Chair), Anne Brennan, Senior Manager, Medical Directorate, Anita Carroll, Assistant Director of Acute Services – Functional Support Services, Claire Graham, Head of Corporate Records, Nigel McClelland, Risk &amp; Governance Manager, Claudine McComiskey, Head of Domiciliary Care (for Melanie McClements), Stephen McNally, Director of Finance &amp; Procurement, Fiona Wright, Assistant Director of Nursing Governance</td>
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<tr>
<td>Director Responsible</td>
<td>Mrs Angela McVeigh, Director of Older People &amp; Primary Care</td>
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| **Originator** | Name of Author: Gerardette McVeigh, Kate Johnston, Imelda McPolin  
Volunteer Co-ordinators |
| **RM / Policy Committee & SMT Approval** | Referred for approval by: Gerard Rocks  
Date of Referral:  
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Responsibility of (name): Mrs Angela McVeigh  
Title: Director of Older People & Primary Care |
VOLUNTEER POLICY & PROCEDURES

Author: Gerardette McVeigh Kate Johnston & Imelda McPolin Volunteer Co-ordinator

Directorate Responsibility: Older People & Primary Care

Date: May 2014

Review Date: June 2017
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INTRODUCTION

1.1 The Southern Health & Social Care Trust (hereinafter referred to as ‘the Trust’) is committed to involving volunteers and this policy has been developed to promote and provide guidance on the appropriate involvement of volunteers throughout the Trust and to ensure that the interests of recipients, volunteers and staff are adequately protected.

1.2 The work carried out by volunteers is welcomed and greatly appreciated. The Trust supports the view that there is a very valuable and purposeful role for volunteers, which is separate and distinct from that of paid workers and therefore not job substitution. Operating within the constraints of this policy, the Trust aims to offer volunteers a variety of interesting and satisfying tasks that will enhance the quality of care or service provided to service users without impinging on the role of paid staff.

1.3 The Trust actively encourages partnerships with the statutory, voluntary and community organisations in the development of volunteering. Not only is the work of volunteers valued, but also the commitment and resources of the Volunteer Support Agencies which operate in some areas to organise and co-ordinate volunteers.

1.4 The Volunteer Policy marks the commitment of the Trust to promoting volunteering, whether through the direct involvement of volunteers in its work, or that of independent service providers, or through the many voluntary organisations that provide health and social care services.

DEFINITIONS

2.1 The Southern Health and Social Care Trust has adopted the following definition of volunteering.
"Volunteering is the commitment of time and energy for the benefit of society and the community, the environment, or individuals outside, (or in addition to) one's immediate family. It is unpaid and undertaken freely and by choice."

(Department for Social Development, Join in Get Involved, Build a Better Future 2012)

For clarity, the following responsibilities are defined:

2.2 **Key Worker** – is responsible for inducting, supporting and supervising volunteers, completing a risk assessment before a volunteer commences their role and informing the Volunteer Coordinator of changes or issues affecting volunteers.

2.3 **Trust Volunteer Coordinator** - is responsible for recruiting and vetting volunteers, developing volunteer roles in partnership with key workers, reviewing, monitoring and evaluating the volunteer service, providing advice on the volunteer policy and procedures.

2.4 **Volunteer Support Agency** – is an external organisation who is responsible for working in partnership with the volunteer service to provide agreed recruitment and support for volunteers and adhering to the Volunteer Policy and Procedures.

3.0 **PURPOSE AND AIMS**

3.1 The purpose of this policy is to provide guidance on the appropriate involvement of volunteers within the Southern Health and Social Care Trust in line with the Regional Plan for Volunteering in Health and Social Care 2014-2017

3.2 The aims of the volunteer policy are to:

3.2.1 Provide a definition of volunteering which the Trust has adopted
3.2.2 Provide clear demarcation between volunteering and paid employment to avoid job substitution

3.2.3 Provide clear guidance on what the Trust’s responsibilities are in relation to its volunteers

3.2.4 Provide clear guidance on what a volunteer should expect and their responsibilities

3.2.5 Provide clear guidance on the recruitment procedure for all volunteers

3.2.6 Ensure that the Trust meets its statutory obligations in relation to the equality legislation

4  POLICY STATEMENT

4.1 The Trust supports the view that there is a very valuable and purposeful role for volunteers, which is separate and distinct from that of paid workers.

4.2 It values the involvement of volunteers in its work because they reflect the interests, needs and resources of the community it aims to serve and bring a unique perspective to all its work.

4.3 The Trust believes that volunteers, through a variety of interesting and satisfying tasks, enhance the quality of care or service provided to patients/clients/residents.

4.4 Volunteers bring with them their own skills and talents, while increasing their own personal growth and development.

4.5 Volunteers contribute to promoting equality of opportunity, social inclusion and help to decrease those who are disadvantaged in the community, thereby improving the quality of life for all.

5  SCOPE OF THE POLICY
5.1 The policy applies to all employees and volunteers of the Trust and refers to all services and activities of the Trust.

6 RESPONSIBILITIES

6.1 Responsibility of the Chief Executive

6.1.1 The Trust Chief Executive as Accountable Officer has overall responsibility for ensuring that the purpose and aims of this policy are met.

6.2 Responsibility of Lead Director

6.2.1 The Director of Older People and Primary Care, is responsible for the effective implementation of this policy and to ensure sufficient resources are made available to support volunteering.

6.3 Responsibility of Directors/Senior Management

6.3.1 All Trust Directors, Assistant Directors, Heads of Services and Senior Managers have responsibility for the effective compliance of this policy and ensure arrangements are in place within their Directorate to support the role of volunteers.

6.4 Role of Front-Line Staff and Line Managers

6.4.1 It is the responsibility of all staff to implement the policy and associated procedures as described in the appendices.

6.5 Responsibility Of Volunteer Co-Ordinator

6.5.1 It is the responsibility of the Trust’s Volunteer Coordinators to ensure the implementation and compliance of the policy.

6.5.2 To ensure volunteers and relevant staff are aware of and understand the requirements of the policy along with their role and responsibility.

7 EQUALITY AND HUMAN RIGHTS CONSIDERATIONS
This policy has been screened for equality implications as required by Section 75 and Schedule 9 of the Northern Ireland Act 1998. Equality Commission guidance states that the purpose of screening is to identify those policies which are likely to have significant impact on equality of opportunity so that greatest resources can be devoted to these.

Using the Equality Commission’s screening criteria; no significant equality implications have been identified. The policy will therefore not be subject to an equality impact assessment.

Similarly, this policy has been considered under the terms of Human Rights Act 1998, and was deemed compatible with the European Convention Rights contained in the Act.

8 **EXPECTATIONS**

8.1 A volunteer can expect from the Trust:

8.1.1 To receive a suitable induction outlining scope of role, supervision etc;

8.1.2 Access to a key worker that the volunteer can contact for support and/or advice;

8.1.3 Specific information on the volunteer role;

8.1.4 Guidelines on how the volunteer should carry out his/her role;

8.1.5 A trial period to see if the role is suitable and to resolve any problems that may arise;

8.1.6 Regular support and supervision;

8.1.7 Choice and flexibility – the volunteer should know who to go to if they have a problem, to be able to say no, opt out or to change tasks if he/she is unhappy in the voluntary role;
8.1.8 Reimbursement of out of pocket expenses

8.1.9 Appropriate indemnity arrangements through a volunteer agreement;

8.1.10 Training to help the volunteer fulfil their volunteering role;

8.1.11 Safe and healthy volunteering;

8.1.12 Respect for diversity where people are treated fairly and equitably;

8.1.13 The opportunity to withdraw from their voluntary role, if he/she is not satisfied with it.

8.1.14 Clearly defined roles of a Trust Volunteer Coordinator and key staff in volunteer support agencies in each locality

8.1.15 Assurance that volunteer roles are not job substitutions.

8.1.16 In supporting volunteers, the need for resources to provide appropriate support is recognised. These resources may include:

- Volunteer Co-coordinator
- Volunteer Recognition Events
- Training
- Supervision
- Provision of out of pocket expenses
- Management at various levels
- Active partnership arrangements with Volunteer Support and other relevant agencies

8.2 The Trust expects from its volunteers

8.2.1 To do their volunteering reliably and with commitment;
8.2.2 To arrive at their role on time and if unable to attend contact their key worker in the first instance as soon as possible;

8.2.3 To always act on and within the advice of the key worker;

8.2.4 To volunteer in a way which corresponds to the aims and values within the Southern Health and Social Care Trust;

8.2.5 To be honest - if any problems should arise, talk to their key worker or Volunteer Co-ordinator;

8.2.6 To attend training and support sessions if these are an agreed part of the voluntary placement;

8.2.7 To respect confidentiality;

8.2.8 To highlight any issues that may contribute to the delivery of better services or a better patient/service user experience;

8.2.9 To inform key worker or Volunteer Co-ordinator as soon as possible if for any reason you wish to stop voluntary work. (If you feel your role is unsuitable it may be possible to find an alternative that is more appropriate);

8.2.10 On completion of voluntary work with the Trust to not disclose any information or matter to which they had access during their time as a volunteer. (Should this happen the Trust reserves the right to take any action necessary as it considers appropriate in the circumstances);

8.2.11 To enjoy the whole volunteering experience.

9 LEGISLATIVE FRAMEWORK

9.1 The legislative framework that governs the volunteer policy includes

- Section 75, Northern Ireland Act 1998
- Health and Safety at Work (NI) Order 1978
- PHA/HSCB Community Development Plan 2012

Page 12 of 83 SHSCT - Volunteer Policy
Department for Social Development, Join in Get Involved, Build a Better Future 2012
Regional Plan for Volunteering in Health and Social Care 2014-2017
Other relevant Trust policies include:
Procedure regarding transport / driving duties
Interim Guidelines for Reimbursement of Service Users, Carers and other stakeholders

10 MONITORING AND REVIEW

10.1 The Trust is committed to ensuring that all policies are kept under review to ensure that they remain compliant with all relevant legalisation and reflect organisational development.

10.2 This policy will be reviewed by the Assistant Director of the Promoting Well Being Team within three years or earlier if required.

11 ALTERNATIVE FORMATS

This document can be made available on request in alternative formats, e.g. plain English, Braille, disc, audiocassette and in other languages to meet the needs of those who are not fluent in English

12 COPYRIGHT

The supply of information under the Freedom of Information does not give the recipient or organisation that receives it the automatic right to re-use it in any way that would infringe copyright. This includes, for example, making multiple copies, publishing and issuing copies to the public. Permission to re-use the information must be obtained in advance from the Trust.

13 SOURCES OF ADVICE AND FURTHER INFORMATION
13.1 This policy should be read in conjunction with related procedures

13.2 Further advice and information regarding this policy document and associated procedures can be obtained from the Volunteer Coordinators

13.3 Your local Volunteer Coordinator can be contacted at:

<table>
<thead>
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<th>Promoting Well Being Team</th>
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</thead>
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<tr>
<td>Brownlow H&amp;SS Centre</td>
<td>St Luke’s Hospital Site</td>
<td>John Mitchel Place</td>
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<tr>
<td>Craigavon BT65 5BE</td>
<td>Armagh BT61 7NQ</td>
<td>Newry BT34 2BP</td>
</tr>
<tr>
<td>Tel: 028 3834 4973</td>
<td>Tel: 028 3741 2116</td>
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VOLUNTEER RECRUITMENT PROCESS

1 The Trust has a standard recruitment procedure that is followed for all new volunteers entering the Trust. Appendix 3 outlines a flowchart that shows the processes that must be adhered to before a volunteer can commence his/her role within the Trust. These are explained more fully below.

2 Stage 1 – Complete Volunteer Role Description

2.1 A role description (Appendix 4) for every volunteering opportunity is completed. This should include a clear description of the roles/tasks/responsibilities/skills and qualities required to carryout the volunteering role. Staff should consider potential roles that support the Trust’s strategic direction and enhance the patient/client experience of care.

2.2 Volunteer Role Descriptions will be signed of by HPSS Trade Unions

3 Stage 2 – Application

3.1 Volunteer completes the Application Form (Appendix 5) and the Trust Equal Opportunities Form (Appendix 6).

3.2 Two references are requested (Appendix 7). A character reference must not be completed by a family member. Two satisfactory references must have been received before a volunteer can commence volunteering.

4 Stage 3 – Vetting

4.1 Access NI checks will be conducted when a volunteer role involves volunteering with children and vulnerable adults. Written consent for the vetting arrangements will be obtained from the Volunteer Application Form.
4.2 The Volunteer Coordinators will process the checks for volunteers within the Trust.

4.3 All relevant information will be shared on a ‘need to know’ basis, in line with the Data Protection Act and Human Rights Legalisation.

4.4 All volunteers who are placed in the Trust complete a Declaration of Health Form and will be assessed by Occupational Health.

5 Stage 4 - Match volunteering opportunities with volunteers

5.1 Volunteering opportunities shall be advertised widely. The Volunteer Coordinators shall maintain a database of up-to-date volunteering opportunities.

6 Stage 5 - Discussion with Key Worker

6.1 Feedback should be given on the response to the volunteer vacancy and dates agreed for meeting volunteer/s.

7 Stage 6 – Interview (Appendix 8)

7.1 The Volunteer Coordinator or Volunteer Support Agency should set up meeting between volunteer and key worker. The Volunteer Coordinator or Volunteer Support Agency will accompany the volunteer to meet with the key worker if requested. The volunteer should be given more detailed information on the role available and shown around the facility.

8 Stage 7 – Choosing a suitable volunteer

8.1 It is only after the interview when both parties have taken time to consider the tasks associated with the volunteer role, that the Volunteer Co-ordinator is informed by both the key worker and volunteer if they wish to proceed. If the key worker feels that the volunteer is suitable, the Volunteer Co-ordinator informs the volunteer and if possible gives them a start date. If
awaiting Access NI checks and references, the volunteer can only be informed of a start date after the checks have come back and the volunteer is still deemed as being suitable.

9 **Stage 8 – Risk Management**

9.1 It is essential that all volunteers are properly managed and supervised in their volunteering role to reduce risks to clients and the volunteer.

9.2 A risk assessment must be completed by the key worker prior to the volunteer commencing their role.

9.3 A risk assessment should consider
   - The volunteer role description
   - The abilities and experience of the volunteer
   - The client group
   - The level of support and supervision that the volunteer will receive

9.4 Volunteers should not be involved in tasks that they have not been properly trained for.

10 **Stage 9 - Volunteering Induction and Placement Induction**

10.1 A Volunteer Agreement (Appendix 9) should be issued. An initial trial period is highlighted e.g. 1 month or a specific number of sessions to allow the volunteer and key worker to assess if the volunteer placement is suitable for both parties.

10.2 The Volunteer should be provided with an induction and Trust induction pack. This should explain areas as volunteer expenses, confidentiality, volunteer responsibilities and details on volunteering and benefits.

10.3 Supervision should be organised between the key worker and the volunteer. Key workers should ensure the provision of a comprehensive induction for the volunteer by using the induction checklist that is included in the Trust's placement induction pack (Appendix 14).

11 **Stage 10 - Ongoing support and mentoring as required**
11.1 The volunteer will be informed of and provided with the Volunteer Coordinator's and key worker's contact details should he/she have any queries or problems relating to their volunteering role.

11.2 The key worker should contact the Volunteer Coordinator should they need any queries answered or to help solve problems surrounding the volunteer should these arise.

12 Stage 11 - Volunteer Co-ordinator Review Visits

12.1 The Volunteer Coordinator will visit the volunteer and key worker in the role during the trial period and monitor progress, identify training needs and discuss volunteer requirements (Appendix 15).

12.2 Thereafter the Volunteer Coordinator will review placements on an annual basis (Appendix 16). The frequency may be increased in agreement with volunteer and key worker if the role or the support needs of the volunteer require it. This will include their progress to date, any training undertaken, key worker comments and evaluation of role.

13 Stage 12 - Recommendations

13.1 Recommendations shall be drawn up after every visit to highlight the highest standards of volunteering practice that is achievable. Any amendments that could be put in place to achieve this shall be discussed with the volunteer and key worker.

14 Stage 13 - Implementation of recommendations

14.1 Recommendations that have been drawn up to increase volunteer development shall wherever possible be put into place.
ADMINISTRATIVE ISSUES

1 VOLUNTEER ROLE DESCRIPTION (Appendix 4)
1.1 If a volunteer vacancy is identified by the Trust, a Role Description must be completed for each individual role. The Role Description must be returned to the Volunteer Co-ordinator so that the vacancy can be promoted, and details given to potential volunteers. Staff should consider potential roles that support the Trust’s strategic direction and enhance the patient/client experience of care.

2 VOLUNTEER APPLICATION FORM (Appendix 5)
2.1 A volunteer application form should be completed before a volunteer is formally considered for a voluntary role within the Trust. If someone enquires about volunteering, their contact details should be forwarded to the Volunteer Co-ordinator, who will then invite the potential volunteer to meet to discuss their interests and how this will best fit with the Trust’s strategic direction and add to the patient experience of care. An equal opportunities monitoring form is also to be completed and returned in the separate envelope provided with the application form (Appendix 6).

3 REFERENCES (Appendix 7)
3.1 All volunteers will be asked to provide 2 referees who are not family members and have known the potential volunteer for at least 2 years. These references may come from Trust staff with direct knowledge of the person. Two satisfactory references must be received before an individual commences volunteering. The Volunteer Co-ordinator has the right to contact a referee if information given is unclear or where further clarification is required.

4 VETTING
The Volunteer Co-ordinator will inform volunteers of vetting arrangements and receive written consent before a check can be carried out. This consent can be obtained from the application form.

5 MEETING THE VOLUNTEER
5.1 Volunteers will be invited to a meeting with the key worker and the Volunteer Co-ordinator and/or volunteer support agency. The purpose of this interview is to provide further information on the volunteering role available and for the potential volunteers to have their questions answered. It also gives the key worker and volunteers the opportunity to assess if the role would be suitable.

5.2 In line with the Data Protection Act and Human Rights Legislation, all information relating to volunteer recruitment will be kept confidential and only shared with the Trust staff where this is necessary.

5.3 A volunteer cannot commence their placement until two acceptable references and Access NI check outcome (if relevant) have been received.

6 VOLUNTEER AGREEMENT (Appendix 9)
6.1 Volunteers must receive a volunteer agreement prior to commencing their volunteering.

6.2 Copies of the Volunteer Agreement will be forwarded to the volunteer, to the key worker; and one copy will be retained by the Volunteer Co-ordinator.

7 INDUCTION
7.1 The Trust recognises the need for all volunteers to undergo an induction programme upon commencement of their role. This will include a facility checklist (Appendix 14), which must be completed by the key worker. The appropriate policies and training should be given to the volunteer during the induction period.

8 VOLUNTEERING IN MENTAL HEALTH AND LEARNING DISABILITY SERVICES
8.1 Volunteers should be advised by the key worker and understand the importance of making a commitment to volunteering in mental health or learning disability services, as broken or short term contact can cause emotional disturbances if an established relationship suddenly ceases following careful confidence building between the volunteer and the individual patient.
8.2 Volunteers will not be routinely included in patients or clients clinical/care discussions or conferences.

8.3 Volunteers are not to have access to clinical notes under any circumstances.

8.4 Volunteers must report incidents/accidents, behaviour changes to the facility/ward manager or their key worker.

9 VOLUNTEER DRIVERS

9.1 This policy applies to volunteers in a role with driving tasks which may or may not include the transport of service users, whether or not they are claiming reimbursement of travel expenses from the Trust. Additional details of the Trust’s specific responsibilities to Volunteer Drivers and those of the Volunteer Driver are outlined in appendix 12

10 CONDUCT

10.1 The Southern Health and Social Care Trust will cease volunteer roles with immediate effect in the following circumstances:

- Breach of confidentiality
- Gross misconduct

10.2 In addition, where there are breaches of other rules and regulations, and after sufficient warnings have been given, the Trust has the right to end the voluntary role. Roles can also be ended in circumstances where they are deemed no longer meeting the needs of the service user and/or the service. Such circumstances can be identified through regular reviews of the role.

10.3 The decision to end a voluntary role will be taken by key worker in liaison with the volunteer and Personnel Department.

11 TRAINING OPPORTUNITIES
11.1 The Trust values the work of volunteers and recognises that appropriate training is necessary and will be provided to all volunteers.

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<td>Personal Care</td>
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<td>As required</td>
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<td>Food Hygiene</td>
<td>As required</td>
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<tr>
<td>Lone Worker</td>
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<td>Social Networking</td>
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<tr>
<td>Adult Safeguarding and Child Protection</td>
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<tr>
<td>Risk Management</td>
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11.2 The volunteer should not be asked to undertake any role for which they have not received specific training.

12 SUPPORT AND SUPERVISION
12.1 As part of the volunteer’s induction programme (Appendix 11), the volunteer will be introduced to their key worker who will be responsible for their supervision.

12.2 All placements should be reviewed within the trial period. Ongoing supervision arrangements will be agreed between the volunteer and the key worker. These arrangements will consider both the nature of the volunteer role and the support needs of the volunteer.

12.3 The Volunteer Coordinator will review all volunteer placements annually.

13 EXPENSES

13.1 The Investing in Volunteering standard regarding the reimbursement of volunteers states that a placement organisation (i.e. the Trust) should have “a clear policy on the reimbursement of volunteers’ out of pocket expenses which is rooted the organisational ethos, and which takes account of the organisation’s financial situation.”

13.2 The Trust values the contribution made by volunteers and supports the view that they should not be left “out of pocket” or financially worse off as a result of their volunteering.

13.3 The Trust will provide an efficient mechanism to reimburse volunteers for “out of pocket” expenses in keeping with the Department Finance Guidelines and Procedures and the Investing in Volunteering Standards.

13.4 The costs that a volunteer is likely to incur in the course of their volunteer duties should be discussed and agreed with the key worker before the commencement of the volunteer placement.

13.5 Travel

   o Reimbursement for travel is currently offered at 27p per mile or on production of a valid bus or community transport receipt.
Reimbursement for taxi fares will only be paid in exceptional circumstances at the discretion of and with prior approval from the Trust.

- Volunteers can be reimbursed actual travel expenses from home to the volunteer placement and the benefit system does not treat these expenses as income provided they are actual and not rounded up amounts.
- Reimbursement for Volunteer Drivers is currently offered at 38p per mile

13.6 Subsistence (meals, e.g.)
- Where these are essential to completing the activity and/or when volunteer session is over 4 hours—volunteer to retain receipts.

13.7 Administration
- Photocopying, Stationary, Postage, phone calls etc. Where this cannot be provided by the Trust, prior approval will be necessary.
- Volunteers should submit receipts for entry fees when accompanying clients (e.g. to swimming pool, social or recreational activity). Prior approval will be necessary
- Protective clothing/uniforms – where these are required they will be provided by the Trust.

13.8 Care of dependants
- While the Trust provides reimbursement for the care of dependants under its interim Service User and Carer Reimbursement Guidance in relation to Personal and Public Involvement (PPI) activities, it does not normally provide reimbursement for the care of dependants for volunteers.
- PPI activities require the involvement of service users and carers who are currently using the services. These activities normally take place at fixed times, or have to be completed within a specific period of time.
- Volunteering, while open to everyone, can be organised flexibly to fit around a volunteer’s available free time and the Trust has a wide range of volunteer opportunities to accommodate choice. It is for this reason that the Trust does
not normally provide reimbursement for the care of dependants for volunteers.

13.9 Full details of the Volunteer Expenses guidelines are outlined at Appendix 18

13.10 The volunteer expenses form must be completed and returned to the key worker; the key worker will then get the budget holder to sign off the form and forward to the finance department by the 10th of each month in order for the volunteer to receive reimbursement of expenses incurred. The key worker will also forward a copy of the volunteer’s mileage claim to the volunteer co-ordinator. If using public transport the volunteer will be asked to retain the bus/train tickets and attach them to the expenses form. (Appendix 19)

13.11 Please note that volunteer expenses shall be taken from the budget of the facility/department who requested the volunteer.

14 LIABILITY

14.1 The Trust will indemnify volunteers against all loss or damages arising out of or in the course of your voluntary role provided that where loss or damage arises as a result of the volunteers negligence, breach or non-observance of regulations or codes of practice, then neither the Trust nor its servants or agents shall be deemed to be liable in connection therewith.

15 CONCERNS

15.1 If a concern arises an attempt to resolve it should be made informally at a local level involving the volunteer, key worker and Volunteer Co-ordinator.

15.2 If the problem cannot be resolved locally, the volunteer or key worker should approach the Volunteer Co-ordinator. The Volunteer Co-ordinator will organise a meeting with the key worker and the volunteer to seek to resolve the problem.
15.3 If the problem cannot be resolved at this level, then it should be referred to the Human Resources Department. The Human Resources Department will convene a meeting to seek to resolve the problem. The Human Resources Department will chair this meeting and will invite the volunteer, the Volunteer Co-ordinator and the key worker. The volunteer will be given the opportunity to invite another person to attend this meeting to speak and ask questions on their behalf. The meeting should agree the appropriate course of action and this should be monitored and reviewed with the volunteer and other relevant people. Accurate and confidential records of the process should be maintained.

15.4 The volunteer has the right to withdraw from their role if they feel that this is necessary. (See the ending or changing volunteer role form Appendix 20)

15.5 The Trust wishes to ensure volunteers understand that they have the right to complain should unacceptable behaviour occur in their volunteer role. The Trust undertakes to investigate complaints thoroughly.

16 EVALUATION OF VOLUNTEER INVOLVEMENT WITHIN THE TRUST

16.1 The Volunteer Co-ordinator will monitor recruitment, selection and ending of volunteer roles within the Trust.

16.2 It is the responsibility of key workers within the Trust to provide the necessary documentation for commencement and ending to the Volunteer Co-ordinator and to provide the relevant information needed to evaluate volunteer services. The volunteer co-ordinator shall complete an annual volunteer review.

17 CONTACT DETAILS

The Volunteer Coordinators can be contacted at;
Promoting Well Being Team
St. Luke’s Hospital Site
71 Loughgall Road,
Armagh BT61 7NQ
Tel: 028 3741 2116  
Fax: 028 3741 2425

<table>
<thead>
<tr>
<th>Promoting Well Being Team</th>
<th>Promoting Well Being Team</th>
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<tbody>
<tr>
<td>Brownlow H&amp;SS Centre</td>
<td>John Mitchel Place</td>
</tr>
<tr>
<td>Craigavon</td>
<td>Newry</td>
</tr>
<tr>
<td>BT65 5BE</td>
<td>BT34 2BP</td>
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<tr>
<td>Tel: 028 38311483</td>
<td>Tel: 028 3083 4325</td>
</tr>
<tr>
<td>Fax 028 3834 5983</td>
<td>Fax: 028 3026 5830</td>
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</tbody>
</table>
RECRUITMENT FLOWCHART

Volunteer requests placement from Volunteer Support Agency

Volunteer Coordinator follows up on request with the volunteer forwarding the Trust's Volunteer application pack

Volunteer Coordinator processes the returned Trust Equal Opportunities Monitoring Form

Volunteer requests placement from the Trust

Volunteer completes SHSCT Application form and Trust Volunteer Coordinator requests references

Role description developed (Trust Volunteer Coordinator)

Role description signed off by the key worker and initial risk assessment carried out

Role description signed off by Staff Side

Access NI check and ID Check (Trust Volunteer Coordinator)

Occupational Health Check (Occupational Health Department)

Matching with an existing role or development of personalized role

Volunteer Role Introduction Visit (Key worker, Volunteer, Volunteer Support Agency (agreed) & Volunteer Coordinator)

Full risk assessment completed (Key Worker)

Volunteer agreement & Guidelines issued (Volunteer Coordinator)

Induction - General (Volunteer Coordinator) Role Specific (Key Worker)

(Continued on next page)
Training – Corporate e.g. Back Care, Health & Safety, Infection Prevention & Control (coordinated by Volunteer Coordinator)
Role Specific (coordinated by Key Worker & Volunteer Coordinator)

Trial Period Review
(Volunteer Coordinator, Key Worker, Volunteer Support Agency (agreed))

Recommendations implemented
(Key Worker, Volunteer Coordinator)

Ongoing support and monitoring
(Key Worker)

Annual Review
(Volunteer Coordinator)

Evaluation and monitoring
(Volunteer Coordinator)

Implementation of recommendations
(Volunteer Steering Committee)

Trial Period Review
(Volunteer Coordinator, Key Worker, Volunteer Support Agency (agreed))
Volunteer Role Description

Volunteer Role Title (i.e. Volunteer Befriender, Volunteer Meeter & Greeter etc.) Staff should consider potential roles that support the Trust’s strategic direction and add to the patient experience of care:

_________________________________________________________________________

Key Worker: ______________________________________________________________

Facility/ Team: _____________________________________________________________

1. Volunteer’s area of responsibility:

_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

2. Please prioritise tasks that the volunteer would be required to do (try to be as specific as possible).

_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

3. Please outline how this role differs from that of a paid member of staff and why a volunteer is required.
4. Please specify on what days and for how many hours a week the volunteer would be required for?

________________________________________________________

________________________________________________________

5. Please include everywhere the volunteer will be expected to be.

________________________________________________________

________________________________________________________

________________________________________________________

6. Who will supervise/support the volunteer? Please give the name and position of this person/s, so that any complaint or grievance the volunteer may have can be reported to the appropriate personnel.

________________________________________________________

________________________________________________________

________________________________________________________

7. How often would this supervision be carried out?

________________________________________________________

________________________________________________________

________________________________________________________

8. What skills would the volunteer need to successfully fill the post?

________________________________________________________

________________________________________________________

________________________________________________________
9 Bearing in mind the nature of the volunteering role available, is there any age that the volunteer must be over?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

10 What training would the volunteer need to receive to successfully fulfil the requirements of the volunteering post?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

11. Please state if this role involves the volunteer having access to children or vulnerable adults.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

12. Does the volunteer need their own transport?

________________________________________________________________________

(Remainder of this form shall be filled in on commencement of volunteer placement)

Start date: ________________________

Trail Period: ________________________

Date of initial review: ________________________

Key Worker’s Signature: ___________ Date: _____

Volunteer’s Signature: _______________ Date: __________

Volunteer Co-ordinator’s Signature: ___________ Date: _____
* Please note that Volunteer travel expenses (if being claimed) shall be taken from the budget of the team who is benefiting from the volunteer.

A key worker should consider the following when offering a placement to a volunteer:

- How does this role differ from that of a paid member of staff and why is a volunteer required?
- How does this role support the strategic direction of the Trust?
- Supported Volunteers – it is the responsibility of the Key Worker to support, review and assess the benefit of the placement to volunteer.
- Expenses – What expenses do you offer? Travel, telephone, stationary, meals, entrance fees etc?
Volunteer Application Form

By completing this application form, you will assist us to find the best placement for you. If you have any difficulties with the form, please ask for assistance. The details will be treated confidentially and will only be passed to the placement provider with your permission.

| Full Name: ________________________________ |
| Maiden Name/Previous Surname(s): ____________ |
| Date of birth: ___________ Place of Birth: ___________ |
| Address: ________________________________ |
| Post code: ________________ |
| Home Tel No.: ___________ Mobile No.: ___________ |
| Email: _________________ Text Phone: ___________ |
| Languages Spoken: ________________________________ |
Please give a brief description of your background, including skills and qualifications you might wish to use in your voluntary work. You may wish to include previous/current experience of employment/ voluntary work/ training/ caring responsibilities.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

How often are you available to volunteer (Please circle)

Daily Weekly Fortnightly Monthly

Please indicate when you are available to volunteer

<table>
<thead>
<tr>
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<th>Mon</th>
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<th>Wed</th>
<th>Thurs</th>
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Please tick which of the following areas of voluntary work you are interested in.

<table>
<thead>
<tr>
<th>Hospital Setting</th>
<th>Entertainment</th>
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</thead>
<tbody>
<tr>
<td>Mental Health</td>
<td>Driving</td>
</tr>
<tr>
<td>Learning Disability</td>
<td>Befriending</td>
</tr>
<tr>
<td>Physical Disability</td>
<td>Summer Scheme</td>
</tr>
<tr>
<td>Sensory impaired/Loss</td>
<td>Arts &amp; crafts</td>
</tr>
<tr>
<td>Older People</td>
<td>Gardening</td>
</tr>
<tr>
<td>Children</td>
<td>Promoting Well Being</td>
</tr>
</tbody>
</table>

Are you happy to be contacted about one - off volunteering opportunities? Yes/No

References: Please name 2 persons (not family members) who have agreed to act as referee on your behalf. If you have been employed before, you must include the details of you former employer.
Have you any disabilities/illnesses which may affect your volunteer work  Yes/No

If yes please specify:

_________________________________________________________________________
_________________________________________________________________________
____________________________________

_________________________________________________________________________
_________________________________________________________________________
____________________________________________________

___________________________________________________________________

Do you have a driving licence?  Do you have access to a car?  Yes / No  Yes / No

Disclosure of criminal record

The sole purpose for requesting information about your criminal record is to offer protection to our client and service users. Any disclosure will be seen in the context of the volunteer role and the nature of the offence. Having a criminal record will not necessarily prevent you from becoming a volunteer.

Under the Rehabilitation of Offenders (Exceptions) Order Northern Ireland, 1979, the Northern Ireland Health and Social Services are included in the list of excepted employers. As such, all criminal convictions may never be regarded as spent and must be disclosed when applying for a post in the Health Service. It is necessary therefore to ask the following questions:

1. Have you ever been convicted of any criminal offence?  Yes ☐  No ☐

2. Are you currently the subject of police investigation?
3. Do you have any prosecutions pending?
   Yes ☐  No ☐

If yes, list below details of ALL charges, prosecutions, convictions, cautions, bind-over orders - even if they happened a long time ago. You must include any minor matters, any road traffic or motoring offences and any which may be pending. If you leave anything out it may affect your application.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Have you been referred to the Independent Safeguarding Authority as a result of misconduct involving children and / or adults?
   Yes ☐  No ☐

If yes please provide full details below:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Independent Safeguarding Authority (ISA) Registration

1. Are you currently registered with the ISA
   YES ☐  Go to Q 1A  No ☐  Go to Q 1B

1A. If Yes please state ISA Registration Number and go to Declaration below

1B. If No have you ever applied for ISA Registration
   YES ☐  Go to Q 2  NO ☐
   If successful you may be required to register – see applicant pack

2. If Yes, are you;
   Awaiting Outcome (go to Declaration) ☐
   Currently Barred ☐
3. Please state why you are barred from ISA Registration

I consent to my ISA registration being checked based on the information included in this form.

Volunteer Driver applicants only.

If an applicant for a volunteer driver post, please state:

1.1 Does your car insurance policy state that you are adequately insured for the purpose of voluntary conveying of passengers for whom payment will be received?  
   Yes ☐ No ☐

1.2 Do you hold a current driving licence?  
   Yes ☐ No ☐

1.3 Have you now or ever had an endorsement on a driving licence?  
   Yes ☐ No ☐

   If the answer to 1.3 above is yes, please give details below, with dates.

   ________________________________________
   ________________________________________
   ________________________________________

1.4 Does your car comply with existing legislation regarding the need for rear seat safety belts?  
   Yes ☐ No ☐

1.5 Make and year of vehicle?
Does your car have a valid M.O.T certificate, if appropriate?

Yes ☐  No ☐

Registration Number

1.6 Insurance Cover:  

Third Party ☐

Third Party, Fire & Theft ☐

Comprehensive ☐

Date of Issue

Company

VOLUNTEER DRIVERS ONLY

PLEASE COMPLETE AND SIGN THE STATEMENT BELOW:

1. I have a clean current Driving Licence and my car Insurance Policy is endorsed to cover the use of the car for official business connected with voluntary driving. I have informed my Insurance Company of the nature of the work being undertaken and it accepts the insurance liability.

2. I agree to produce my current Driving Licence and car Insurance Policy to the Transport Controller/Head of Department before I am permitted to undertake any voluntary driving tasks on behalf of the Southern Health & Social Services Trust.

3. I am prepared also to keep accurate mileage records as required and to submit monthly returns to Transport Services

Signed _____________________ Date ______________
Consent and Declaration of Accuracy

I understand, depending on where I undertake my role that a criminal record check with the police may be carried out before my appointment can be confirmed and I am aware that spent convictions may be disclosed. I am also aware that I will have to undertake a health check before commencing volunteer work within the Trust. I declare that the information I have given is accurate and I consent to the police check being made.

Signature:_____________________________ Date: ________________

Official Use Only

ID Check carried out □

Preferred volunteer opportunities:
1. _________________________
2. _________________________
3. _________________________

O.H. appointment Date ________________

References Sent Date ________________

Confirmed Volunteer Placement _________________________________

Start Date ________________
Explanatory Note:

The Southern Health and Social Care Trust wishes to ensure its services are accessible to everyone regardless of their age, gender, marital status, sexual orientation, transsexuality, religion, political opinion, race, nationality and whether or not they have a disability or dependents.

Whilst the completion of this monitoring form is optional, the Trust would appreciate your cooperation in order that it may monitor and evaluate that involvement in decision-making processes is accessible to all service users, carers and stakeholders.

ACCESS TO ANY INFORMATION SUPPLIED WILL BE STRICTLY CONTROLLED BY THE TRUST

1. COMMUNITY BACKGROUND

I am a member of the Protestant Community
I am a member of the Roman Catholic Community
I am a member of neither the Protestant nor Roman Catholic Community

2. RELIGIOUS BELIEF

There may be occasions where religious belief differs from perceived community background. Would you please indicate below your religious belief (e.g. Muslim, Hindu, Sikh, Jewish, Buddhist, Christian, None, etc.)

Please specify: ________________________________

3. GENDER

Male

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Female □

4. MARITAL STATUS

Single □
Married/Civil Partnership □
Other □

5. DISABILITY

Disability is defined as a physical or mental impairment which has a substantial and long-term adverse effect on the individual's ability to carry out normal day-to-day activities. NB: When responding to this question, please do not take into consideration any medication, treatment or prostheses that help you manage your condition (with the exception of glasses or contact lenses).

Do you consider yourself to have a disability? Yes □ No □

If “Yes”, please indicate the nature of your disability:

- Physical Impairment, such as difficulty using arms or mobility requiring a wheelchair or crutches □
- Sensory Impairment, such as blind/visual impairment or deaf/hearing impairment □
- Mental Health Condition, such as depression or schizophrenia □
- Learning Disability, such as Down’s Syndrome, Dyslexia or Cognitive Impairment such as Autism □
- Long standing illness, such as cancer, HIV, diabetes, chronic heart disease or epilepsy □
- Other ____________________________

6. RACE/ETHNIC ORIGIN

White □ Black African □
Bangladeshi □ Pakistani □
Black Caribbean □ Irish Traveller □
Chinese □ Indian □
Filipino □ Mixed Ethnic Group □
Black Other □

Any other Ethnic Group (please specify) ____________________________

7. NATIONALITY

(e.g. Latvian, Lithuanian, British, Portuguese, Irish, Polish, etc.)

Please specify: ____________________________

8. POLITICAL OPINION
9. **CARING RESPONSIBILITIES**

Do you have any dependants?  
Yes □  
No □  

If “Yes”, are you responsible for the:

- Care of a child/children □  
- Care of a dependent older person □  
- Care of a person(s) with a disability □  

10. **DATE OF BIRTH**

_____ / _____ / _____  

Please tick the age category to which you belong:

- 16 – 29 □  
- 30 – 44 □  
- 45 – 59 □  
- Over 60 □  

11. **SEXUAL ORIENTATION**

My sexual orientation is towards someone:

- Of the opposite sex □  
- Of the same sex □  
- Of the same sex and of the opposite sex □  
- I do not wish to answer □  

---

THANK YOU FOR YOUR CO-OPERATION
VOLUNTEER REFERENCE FORM

Volunteer Reference Form Confidential

Reference for: ____________________________________________

Address: ________________________________________________

Area in which voluntary work is sought: ______________________

The person named above is being considered as a potential volunteer to work within Southern Health and Social Care Trust and has given your name as a referee.

Volunteers need to be reliable, trustworthy and have a sensitive approach to the needs of people as well as being aware of confidentiality. I would appreciate your comments on the suitability of the potential volunteer to undertake voluntary work. Any information given will be held confidential to the Trust.

1. For how long have you known this person?

__________________________________________________________________________

2. What is your relationship to this person?

__________________________________________________________________________

3. The voluntary role may involve substantial access to children and vulnerable groups. As an organisation we are committed to the welfare and protection of these groups. We are anxious to know if you have any reason at all to be concerned about this applicant being in contact with children or vulnerable adults.

Please tick the appropriate box

No. I do not have any concerns about this person being in contact with children or vulnerable adults. ☐

Yes, I have concerns about this volunteer being in contact with children and vulnerable adults. ☐

If you have answered YES, we will contact you in confidence.
4. Please state his/her positive qualities and strengths e.g. reliable, trustworthy

________________________________________________________

________________________________________________________

________________________________________________________

5. In your opinion are there any areas of voluntary work that would prove too demanding for this person?

________________________________________________________

________________________________________________________

________________________________________________________

6. Please comment on the suitability of this person to undertake voluntary work.

________________________________________________________

________________________________________________________

________________________________________________________

7. Please give any other information you feel may be relevant.

________________________________________________________

________________________________________________________

________________________________________________________

________________________________________________________

Print Name: _____________________

Signature: _____________________ Date: ________

Daytime Telephone Number: ____________________________

Thank you very much for taking the time to complete this reference. Please return it in the envelope provided.
Volunteer Interview Form

Name: ________________________________________________________________

1. Why do you want to volunteer within the Southern Trust?
   _________________________________________________________________
   _________________________________________________________________
   _________________________________________________________________
   _________________________________________________________________

2. Why do you think you would enjoy this type of voluntary work?
   _________________________________________________________________
   _________________________________________________________________
   _________________________________________________________________
   _________________________________________________________________
   _________________________________________________________________

3. Have you any previous experience of voluntary work? Yes/No
   If YES, please give details
   _________________________________________________________________
   _________________________________________________________________
   _________________________________________________________________
   _________________________________________________________________

4. Have you any skills or interests that you would like to use or develop in the course of your voluntary work?
   _________________________________________________________________
11 What support or training do you think you will need in this volunteer role?

__________________________________________________________________________

12 Are there any special requirements that you need in order to support you in this role?

__________________________________________________________________________

Interviewed by: ______________________ Date: __________
VOLUNTEER AGREEMENT

SOUTHERN HEALTH AND SOCIAL CARE TRUST

Dear

I would like to confirm that Southern Health and Social Care Trust is pleased to welcome you as one of its volunteers within ________________________________.

I would like to take this opportunity to outline the expectations of both the Trust and you as one of our new volunteers. This of course is a voluntary arrangement and the obligations are binding in honour only.

___________ will be your key worker and responsible for your voluntary placement. You will start on ____________ with a six week trial period. This will consist of an induction programme, initial training and a trial period of voluntary work. Your key worker and the Volunteer Coordinator will review your voluntary role after the trial period.

As agreed at the interview, you will volunteer for approximately ________________________. This will only be changed after discussion with your key worker. If you cannot attend, or have a particular problem, please contact your key worker.

Enclosed with this letter is a copy of your role description, outlining the nature and purpose of your voluntary role, and you have agreed to only undertake those tasks detailed, unless prior agreement is given through your key worker. The Guidelines for Volunteers with the Trust is also enclosed and they outline procedures for what happens if appropriate conduct is not maintained.

You will be required to conform to any policies and procedures issued by the Trust or any authorised personnel of any hospital or facility at which you are placed.
The Trust will indemnify you against all loss or damages arising out of or in the course of your voluntary role provided that where loss or damage arises as a result of your negligence, breach or non-observance of regulations or codes of practice, then neither the Trust nor its servants or agents shall be deemed to be liable in connection therewith.

The Trust will provide all necessary protective clothing, and agreed expenses. We will give you as much support as possible and review dates will be agreed with your key worker. You can of course contact the Volunteer Coordinator at any time if you have a problem or query. Training, as you have been told, is necessary to help you carry out your role effectively. This will be incorporated as far as possible into the time that you will be with us each week.

Your induction programme will be in ______________ I will be in contact nearer the date. It is important that you attend. All procedures and details listed in this letter will be outlined in full at the first session.

Data Protection Act 1988

The Southern Health and Social Care Trust is committed to the Data Protection Principles as laid out in the Data Protection Act 1988 in relation to the ways we store and process manual and electronic personal data. All personal information the Trust holds about you is treated in confidence and only shared with staff who need to see it for purposes connected with your placement.

Any personal information relating to staff / patients / clients that you become aware of through the course of you placement with the Trust must be kept confidential.

The duty to maintain confidentiality also covers deceased staff / patients / clients.

Any personal information you become aware of during the course of your placement must remain confidential even after your placement has ended.

The duty to maintain confidentiality extends to personal information in all formats including paper / electronic / audio records, images and information retained by memory.

**Staff and volunteers should be aware that they can be criminally liable if they knowingly or recklessly disclose personal data.**
Staff or volunteers responsible for the handling of information will be held personally liable at law if they handle or process personal data in any way that is in variance with or in contravention of:-

1. The appropriate terms of the Data Protection Act 1998 and/or
2. The Common Law Duty of Confidentiality

Records Management
Volunteers must only access information that is required to carry out their role.

Access to patient / client records is regularly monitored and audited.

Access to electronic records and systems is monitored via privacy detection software which will highlight any volunteer or staff member who has inappropriately accessed records.

Volunteers are not permitted to check their own records or those of family members / friends / work colleagues.

If you are happy with the details in this letter, please complete the reply slip attached to this letter and return to the Volunteer Co-ordinator.

Yours Sincerely

Volunteer Service
VOLUNTEER CONSENT FORM

I do / do not give permission for my photograph to be used in the Southern Trust literature (please delete as appropriate)

Print Name: ________________________________

Signed: ________________________________

Date: _________________
The Trust supports the view that there is a very valuable and purposeful role for volunteers, which is separate and distinct from that of paid workers. It values the involvement of volunteers in its work because they reflect the interests, needs and resources of the community it aims to serve and bring a unique perspective to all its work. The Trust believes that volunteers, through a variety of interesting and satisfying tasks, enhance the quality of care or service provided to patients/clients/residents. Volunteers bring with them their own skills and talents, while increasing their own personal growth and development. Volunteers contribute to promoting equality of opportunity, social inclusion and help to decrease those who are disadvantaged in the community, thereby improving the quality of life for all.

While these guidelines appear formal, they underline the importance of volunteering. The Trust wishes you to gain maximum benefit and fulfilment from your voluntary work and we will take all reasonable steps to enable you to help others while enjoying the experience. The Trust also wishes to express appreciation for the thought and effort you have put into this opportunity.

1. **WHAT THE VOLUNTEER CAN EXPECT FROM THE TRUST**

1.1 You will be treated equally, fairly and with respect by the Trust.

1.2 The Volunteer Service will endeavour to meet your needs and capabilities, to offer support and be flexible with choices and alternatives wherever possible. If you need to speak to the Volunteer Coordinator he/she will make contact with you within 5 working days.
1.3 You will be given information about your role and what is expected from you. You will be able to visit your volunteer role and meet your key worker prior to accepting your role. You should know who to go to if you have a problem, to be able to say no, opt out or to change tasks if you are unhappy in the voluntary role.

1.4 You will have a trial period appropriate to your role to enable you and the Trust to decide if it is suitable.

1.5 You will receive a suitable induction outlining scope of role, supervision etc; you will be expected to participate in Induction Training about the Trust, its policies and the role of a volunteer. The Trust will also offer a range of training opportunities to support you to carry out your volunteer duties safely and with regard to clients and patients. You will be encouraged to participate in training.

1.6 Our staff will support and advise you and a member of staff will be identified as your key worker to help you carry out your role as a volunteer.

1.7 You will receive regular support and supervision from your key worker.

1.8 Supported volunteers – It is the responsibility of the key worker, volunteer coordinator and referral agency placing the volunteer in a therapeutic role to support, review and assess the benefit of the role to the volunteer.
1.9 **Indemnity** – The volunteer will be covered as per other members
The Trust will indemnify volunteers against all loss or damages
arising out of or in the course of your voluntary role provided that
where loss or damage arises as a result of the volunteers
negligence, breach or non-observance of regulations or codes of
practice, then neither the Trust nor its servants or agents shall be
deemed to be liable in connection therewith.

1.10 **Expenses** – As a general principle, volunteers should not be out
of pocket as a result of their volunteering and should be
supported by the Trust if they do not have an alternative source
of funding. The role description will indicate the likely approved
expenses to be incurred and the procedure for repayment will be
covered during induction.

1.11 **Meeting the needs of Patients/Clients and Volunteers** - The
Trust is interested in your views about the Volunteer Service and
its development. We will conduct regular surveys and focus
groups in which you will be invited to participate. We will also
survey facility managers and client/patient groups about the
value of the volunteer service to them.

2. **EXPECTATIONS OF THE KEY WORKER**

2.1 Your key worker will decide the nature and the limits of your
contact with the client / patient.

2.2 Your key worker will inform you about any local procedures that
are relevant to your volunteering activity.
2.3 Your key worker will ensure that you are informed of any equal opportunities or human rights implications of working with a particular client/patient.

2.4 Local management and staff should be briefed about your role and make you feel welcome and appreciated, keep you informed and take account of your views when making decisions which will affect you.

3 **EXPECTATIONS OF THE VOLUNTEER**

3.1 **Your commitment** - You should decide how much time you can reasonably commit and the Trust will expect that you will honour your commitment as fully as possible in order to avoid disappointment and inconvenience to others.

3.2 Please try to arrive on time particularly if you are working in a group, as other staff and volunteers may have organised their work or activities to include you. If you are unable to attend you should tell your named contact as soon as possible.

3.3 You should always act on and within the advice of the key worker.

3.4 In general, you should not engage in activities with the client/patient which directly duplicate or replace the role and tasks of a member of staff.

3.5 **Any concerns about clients / patients or your placement** should initially be directed to your key worker and, if not resolved at this level, you should contact the Volunteer Coordinator.
3.6 If a patient or client ever asks you to do anything that makes you feel uncomfortable or you think is wrong, politely refuse and seek the advice of a member of staff. If you become aware of any factors which may create risk for the client / patient (e.g. abuse) you should refer the matters immediately to the key worker.

3.7 Confidentiality - It is vital that you do not repeat things which you may learn about particular persons in the course of your work with the Trust. This is especially important when you are involved in working with an individual or family in some way. If you are approached by an individual or organisation, or the media, about your work, you should check first with your key worker or with the Volunteer Coordinator.

3.8 You should not seek medical or social information from the client / patient without the client’s / patient’s consent. If you are asked by a patient to share your home telephone number or address, politely say you are not permitted to share this information and inform the staff member in charge.

3.1 Standards of Conduct - Trust staff and volunteers must have and be seen to have, high standards of honesty, propriety and integrity in the exercise of their duties. Volunteers should not receive gifts, hospitality or benefits of any kind from patients/clients, or any other third party which might be seen to compromise their personal judgement or integrity. Volunteers need to be aware of the use of social networking sites while volunteering within the Trust and adhere to the Trust Social Networking policy. It is extremely important to note that if you use social networking sites while volunteering within the Southern
Trust that you do not mention the placement within which you volunteer, any person’s name e.g. service user, patient or staff member or speak about anything you have heard while volunteering.

3.2 **NO SMOKING** is regarded as the norm in all facilities within the Trust. If you volunteer within a client’s home, the client should refrain from smoking for the duration of the visit. If difficulties arise where a client continues to smoke, you should contact your key worker in the first instance.

3.3 **Finishing volunteering** – If for any reason you wish to stop voluntary work, please inform your key worker or the Volunteer Coordinator as early as possible. If you feel that your role is unsuitable it may be possible to find an alternative that is more appropriate. Never be afraid to seek advice on anything that concerns you, the Volunteer Coordinator will be pleased to discuss any concerns you may have.

4 **WHAT TO DO IF YOU HAVE A CONCERN OR PROBLEM WITH YOUR ROLE**

4.1 You should approach the Key Worker and seek to resolve the problem informally.

4.2 If the problem cannot be resolved locally, or if you feel unable to approach your Key Worker directly, then you should approach the Volunteer Co-ordinator. The Volunteer Co-ordinator will organise a meeting with the Key Worker and yourself to seek to resolve the problem.

4.3 If the problem cannot be resolved at this level, then you will be entitled to approach the Human Resources Department and ask the Department to convene a meeting to seek to resolve the problem. The Human Resources Department will chair this
meeting and will invite you, the Volunteer Co-ordinator and the Key Worker. If you wish, you may invite another person to attend this meeting to speak and ask questions on your behalf. If you intend to invite such a person you should inform the Human Resources Department prior to the meeting.

4.4 The meeting should agree the appropriate course of action and this should be monitored and reviewed with the volunteer and other relevant people. Accurate and confidential records of the process should be maintained.

4.5 You may also approach the Volunteer Centre or other agency where appropriate for advice and support.

4.6 You always have the right to withdraw from the placement if you consider it necessary.

5 WHAT THE TRUST WILL DO IF A CONCERN, PROBLEM OR PERFORMANCE ISSUE ARRIVES IN A ROLE

5.1 The Key Worker will approach you and seek to resolve the problem informally at local level. He / she will inform your Co-ordinator of the problem and the outcome of the meeting.

5.2 If the problem cannot be resolved at this level then the Key Worker will approach the Volunteer Co-ordinator who will organise a meeting with yourself and the Local Manager / Key Worker to seek to resolve the problem.

5.3 If the problem cannot be resolved at this level, then the Volunteer Co-ordinator will approach the Human Resources Department to convene a meeting which they will chair, which will seek to resolve the problem. You will be invited to attend this meeting with the Volunteer Co-ordinator, the Key Worker. If you wish, you may invite another person to attend this meeting to speak and ask questions on your behalf. If you intend to invite such a person you should inform the Human Resources Department prior to the meeting.

5.4 The meeting should agree the appropriate course of action and this should be monitored and reviewed with the volunteer and other relevant people. Accurate and confidential records of the process should be maintained.
5.5 The Trust retains the right to ask you to leave before the end of the placement if it considers it necessary in the interests of the service.

6 HEALTH AND SAFETY

6.1 The Trust will ensure, so far as is reasonably practical, the health, safety and welfare of all its employees / volunteers.

6.2 The law stipulates that you, as a volunteer, have a duty and responsibility to take all reasonable care for the health and safety of yourself and other persons who may be affected by your actions and / or omissions during your volunteering activity.

6.3 You have a duty to assist and co-operate with the Trust and comply with any legal requirements imposed on it. You should assist and co-operate with an inspection of the workplace or investigations of accidents, which are relevant, to your volunteering activity. The Trust will arrange training on health and safety procedures, safe working practices and the correct use of equipment as is appropriate for your volunteering activity.

6.4 The Trust recognises that volunteers carrying out their duties may be vulnerable to violence or harassment from patients, clients, relatives or members of the public. The personal safety of volunteers and employees is essential and any act of threatened aggression towards them is unacceptable.

7 EQUALITY OF OPPORTUNITY AND HUMAN RIGHTS

7.1 It is the policy of The Southern Health & Social Care Trust that all persons will have equality of opportunity regardless of sex, age, marital status, sexual orientation, transsexuality, perceived religious affiliation, political opinion, race or ethnic origin or disability.

7.2 The policy requires management, staff and volunteers to critically examine their attitudes and behaviour towards people to ensure no trace of discrimination is allowed to affect their judgement. Any volunteer who acts contrary to the policy places their continued engagement with the Trust in jeopardy.
GUIDELINES FOR VOLUNTEER DRIVERS AND KEY WORKERS

1.0 The Trust recognises the significant contribution made by volunteer drivers. This policy has been developed to comply with the Corporate Manslaughter and Corporate Homicide Act (2007) by implementing effective processes to deal with health and safety in relation to volunteer driving.

1.1 It is the responsibility of managers to ensure that staff are aware of this policy and for key workers and volunteers to familiarise themselves with this policy and ensure they adhere to the contents.

2.0 DEFINITIONS / SCOPE OF THE POLICY

2.1 This policy applies to volunteers in a role with include driving tasks which may or may not include the transport of service users, whether or not they are claiming reimbursement of travel expenses from the Trust.

The document provides direction to all staff involved with volunteers.

3.0 ROLES/RESPONSIBILITIES

3.1 The Trust is responsible for ensuring volunteer drivers are recruited in accordance with the Volunteer Policy and Recruitment & Selection Procedure, this requires prospective volunteers to:

- Provide two appropriate references
- Complete Access NI check
- Provide details of any illness or disability, which may affect their ability to drive. However, a disability will not automatically stop people from becoming a volunteer driver.
- Attend Occupational Health Department for medical assessment.

3.2 The Trust is responsible for ensuring appropriate checks are completed; volunteer drivers must provide the Trust with evidence that they have:

- A minimum of 3 years qualified driving experience prior to appointment.
- A valid original full UK driving licence. It is preferable that volunteers do not have any sanctions on their licence. However, the nature of the sanction, if any, will be taken into account when deciding if the volunteer is suitable. The volunteer’s driving licence must be checked for sanctions, on an annual basis. A record and copies must be kept.
- Valid motor insurance that covers them to undertake voluntary work. This must be checked annually and recorded.
- A valid tax disc for the vehicle being used to transport patients/clients. This must be checked annually and recorded.
• A valid MOT certificate for cars over four years old. This must be checked annually and recorded.
• Standard letter template attached at Appendix 19

3.3 The Trust is responsible for ensuring volunteer drivers are provided with appropriate information and training.

3.3.1 Volunteer drivers must attend manual handling training.

3.3.2 Volunteer Drivers must attend Adult Safeguarding and Child Protection training

3.3.3 Volunteer drivers are advised that a seatbelt must be worn by the driver and passengers during driving.

3.3.4 Volunteer drivers are advised that smoking is not permitted in the vehicle while transport is being delivered.

3.3.5 Volunteer drivers are advised that other people or animals should not be transported along with service users, this excludes guide dogs; however, the driver will be informed in advance if a service user with a guide dog is to be transported.

3.3.6 Volunteer drivers are provided with information and guidance on how to claim for reimbursement of out of pocket expenses in line with the Trust’s Volunteer Policy & Guidelines.

3.4 The Trust is responsible for ensuring volunteer drivers have appropriate support, guidance and supervision. A key worker within Transport Services will be appointed to:

• Provide the volunteer driver with a schedule of driving duties, taking rest breaks into account.
• Provide the volunteer driver with personal protective equipment as required.
• Consider any risks that may be associated with the volunteer role, e.g. manual handling.
• Provide the volunteer with support in the event of a breakdown or an accident e.g. make alternative transport arrangements for the patient/service user or support the volunteer in completion of an IR1 form. Procedure in relation to reporting in the event of a breakdown is attached at Appendix 22
• Be the volunteer driver’s point of contact and will be responsible for providing the volunteer with guidance and support and training to carry out their role effectively.
• Be responsible for authorising the reimbursement of out of pocket expenses claims forms for the volunteer driver in line with schedule of driving duties.
3.5 Volunteer drivers are responsible for compliance with Trust policies and procedures and meeting the expectations of the Trust. The Highway Code is paramount at all times while undertaking driving duties and should be strictly adhered to. Prospective volunteer drivers and/or volunteer drivers:

- Must ensure they have a valid full UK driving licence when undertaking driving duties and submit a copy of same to the Trust for recording purposes.
- Must inform the Trust of any formal cautions/prosecution/pending for a driving offence.
- Must inform the Trust of any illness or disability which may affect their ability to drive.
- Must declare authorised drug use to the Trust, this will be assessed with medical advice, where appropriate, to determine if it will impair judgement or fitness to drive.
- Must not undertake driving duties if they are taking prescription medication that presents side effects which may impair driving skills.
- Are reminded they have a legal duty to satisfy the eyesight requirements in the Highway Code.
- Must not have consumed any alcohol for at least 12 hours before commencing driving duties.
- Must not drive whilst under the influence of any unauthorised drugs.
- Must ensure they are in possession of a valid insurance certificate for the vehicle and inform their motor insurance company that they are using their vehicle to undertake voluntary work, transporting service users. A copy of said certificate must be submitted to the Trust Transport Services Department for recording purposes.
- Must ensure they have a valid tax disc for the vehicle being used to transport service users.
- Must ensure they have a valid MOT certificate (if the vehicle being used to transport service users is over 4 years old). MOT certificate for the vehicle must be submitted to the Trust Transport Services Department for recording purposes.
- Must submit their car registration book to the Trust Transport Services Department for recording purposes.
- Must check their vehicle for the following functions before each journey:
  - Engine oil, water
  - Lights, indicators, brake lights
  - Windscreen wipers
  - Vehicle damage – internal/external
  - Tyres, inflation, tread, damage
  - Exhaust – noise
  - Cleanliness – internal/external
  - Fuel level
- Must not use their mobile phone or hands free device whilst undertaking driving duties
- Must wear their Trust ID badge whilst volunteering.
- Must only undertake driving duties as directed by their key worker/ transport services department.
• Are advised to contact their key worker/transport services department for advice if they consider the service user’s condition is such that it warrants more care and support than they are able to give, or if their behaviour is such that it could impose a risk to the service user’s safe transportation.

• Are advised they and their passenger/s must wear seatbelts at all times during transport. When carrying children appropriate children’s seats must be correctly fitted. However it is the responsibility of the adult travelling with the child (guardian) to ensure that this is the case, it is not the responsibility of the volunteer to provide or fit the child seat, if a guardian is present. Volunteers should not transport children unless a child seat has been supplied as it is the driver who will be prosecuted (3 penalty points + fine).

• Must observe speed limits at all times

• Must take 15 minute rest breaks every two hours both within and between journeys and should not drive for long periods of time in addition to their normal working hours or during their normal sleeping time.

• Are advised smoking is not permitted while providing transport in their vehicle.

• In the event of a breakdown the volunteer must contact the key worker/transport services department who will arrange alternative transport for the service user.

• Must immediately contact the key worker/transport services in the event of an accident, they will take responsibility for the service user.

• Report all accidents to the Risk Management Department via Trust incident (IR1) form within 24 hrs, the key worker/transport services department will support the volunteer to complete the form.

• Are responsible for informing the key worker/transport services department if they have any concerns about their driving duties.

4.0 KEY POLICY PRINCIPLES

4.1 The Promoting Well Being Team is responsible for the development of policies relating to volunteering.

4.2 The Volunteer Coordinator will ensure the recruitment & selection of volunteer drivers is in line with the Trusts Volunteer Policy and Recruitment and Selection Procedure.

4.3 The Head of Transport Services will make all decisions regarding prosecutions or pending prosecutions on a volunteer’s licence.

4.4 The Transport Services Department will request and record volunteer driver’s documentation i.e. driver’s licence, MOT certificate and insurance details on an annual basis.

4.5 The key worker/transport services department will compile a schedule of journeys to transport service users assessed and deemed suitable for transportation by a volunteer.

4.6 The key worker/transport services department will provide the volunteer with the schedule of journeys and maintain a record of same
4.7 The volunteer will be reimbursed for out of pocket expenses as set down in the Volunteer Reimbursement of Expenses Policy & Guidelines

4.6 The key worker/transport services department will be responsible for the continual support and supervision of the Volunteer Driver

4.7 Trust policies relating to volunteering will be included in ‘Guidance for Key Workers’

4.8 Volunteers will be provided with an Induction Pack which will refer to Trust policies relating to volunteering and provide guidance on how to access the full policy.

5.0 **MONITORING**

Volunteering Services and the Transport Services Department are responsible for evaluating the Policy to ensure it is meeting the objectives.
INDUCTION PROGRAMME FOR VOLUNTARY ROLE

When a volunteer commences volunteering within Southern Health and Social Care Trust they will undergo a volunteer induction. This is to ensure that they are familiar with their surroundings and clearly understand their role and that adequate training and support is provided.

The key worker is responsible for ensuring that the volunteer has received an adequate induction for the volunteering role.

The responsibilities of the key worker towards volunteers are to ensure:

1. That a risk assessment is completed before volunteer starts their role
2. On the volunteers first day to welcome the volunteer and introduce to staff, explaining what each member of staff's role is
3. Discuss in more detail than given in the role description what the volunteer role covers
4. Go through the induction checklist with the volunteer and ensure the volunteer knows what his/her responsibilities are
5. Complete a trial period review in conjunction with the volunteer coordinator and the volunteer support agency where appropriate
6. Ensure that all points highlighted in the induction checklist have been fulfilled
7. Ensure that ongoing support and appropriate training is available to a volunteer
Induction Check List

Volunteers Name: ____________________________________________________________

Facility/Department: ________________________________________________________

Start Date: __________________________________________________________________

Volunteer Hours: ____________________________________________________________

<table>
<thead>
<tr>
<th>To be completed on volunteers first day</th>
<th>To be explained /carried out by</th>
<th>Date and initial when completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Initial reception</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ Welcome volunteer and introduce them to staff</td>
<td>Key Worker</td>
<td></td>
</tr>
<tr>
<td>✦ Appoint key worker</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Explain the following:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ Brief outline of Trust</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ Trusts’ aims, philosophy and ethos</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ About the clients</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ The kind of work done and why</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ How the clients benefit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ Limitations of the Trust</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ Structure; departments/teams and how the volunteer fits in</td>
<td></td>
<td></td>
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<tr>
<td>✦ Trust Management</td>
<td></td>
<td></td>
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<tr>
<td>2. The building</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ Tour of premises</td>
<td>Key Worker</td>
<td></td>
</tr>
<tr>
<td>✦ Toilets, cloakrooms, parking etc.</td>
<td></td>
<td></td>
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<tr>
<td>✦ Where to get tea/coffee and is it free?</td>
<td></td>
<td></td>
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<tr>
<td>✦ Photocopier</td>
<td></td>
<td></td>
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<tr>
<td>✦ Dining facilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✦ Health &amp; Safety rules - Emergency exits and Evacuation procedures</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>To be completed on volunteers first day</strong></td>
<td><strong>To be explained/carried out by</strong></td>
<td><strong>Date and initial when completed</strong></td>
</tr>
<tr>
<td>------------------------------------------</td>
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<td>-------------------------------------</td>
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<tr>
<td><strong>3. Facility Rules</strong></td>
<td></td>
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</tr>
<tr>
<td>♦ Smoking</td>
<td></td>
<td><strong>Key Worker</strong></td>
</tr>
<tr>
<td>♦ Use of telephone for personal use</td>
<td></td>
<td></td>
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<tr>
<td>♦ Use of mobile phones</td>
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<tr>
<td>♦ Security arrangements in relation to storage of personal property</td>
<td></td>
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<tr>
<td><strong>4. Role of the Volunteer</strong></td>
<td></td>
<td><strong>Key Worker</strong></td>
</tr>
<tr>
<td>♦ Volunteer’s area of responsibility</td>
<td></td>
<td></td>
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<tr>
<td>♦ Days/hours that volunteer will volunteer</td>
<td></td>
<td></td>
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<tr>
<td>♦ Importance of reliability</td>
<td></td>
<td></td>
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<tr>
<td>♦ Trial period</td>
<td></td>
<td></td>
</tr>
<tr>
<td>♦ Likely problems and how to cope</td>
<td></td>
<td></td>
</tr>
<tr>
<td>♦ System for reporting back</td>
<td></td>
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<tr>
<td>♦ Practical help and suggestions</td>
<td></td>
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</tr>
<tr>
<td>♦ Important to let the key worker know if you are unable to attend</td>
<td></td>
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<tr>
<td><strong>5. Volunteer’s support system</strong></td>
<td></td>
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<tr>
<td>♦ Who will supervise the volunteer</td>
<td></td>
<td></td>
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<tr>
<td>♦ Where and when you can contact this person</td>
<td></td>
<td></td>
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<tr>
<td>♦ Support available</td>
<td></td>
<td></td>
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<tr>
<td>♦ Supervision meetings</td>
<td></td>
<td></td>
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<tr>
<td>♦ Training available</td>
<td></td>
<td></td>
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<tr>
<td>♦ Expenses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>♦ How are grievances handled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>♦ Insurance cover for volunteers</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>6. Health and Safety</strong></td>
<td><strong>Key Worker</strong></td>
<td></td>
</tr>
<tr>
<td>Risk assessment carried out and volunteer informed of control measures in place for their safety</td>
<td></td>
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<tr>
<td>♦ First Aid facilities</td>
<td></td>
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<tr>
<td>♦ Local First Aider</td>
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<td></td>
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<tr>
<td>♦ Health &amp; Safety policy manual</td>
<td></td>
<td></td>
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<tr>
<td>♦ Accident / incident reporting</td>
<td></td>
<td></td>
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<tr>
<td>♦ Immediate hazards</td>
<td></td>
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<tr>
<td>♦ Safety regulations/prevention of accidents</td>
<td></td>
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<tr>
<td>♦ Fire procedures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>♦ Skin care policy (if appropriate)</td>
<td></td>
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<tr>
<td>7. Other Information</td>
<td>Key Worker</td>
<td>8. Training</td>
</tr>
<tr>
<td>----------------------------------------------</td>
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<td>--------------------------------------------------</td>
</tr>
<tr>
<td>♦ Confidentiality</td>
<td></td>
<td>♦ On the job training</td>
</tr>
<tr>
<td>♦ Trust Policies</td>
<td></td>
<td>♦ Use of equipment</td>
</tr>
<tr>
<td>♦ Any further information that is deemed necessary in order for the volunteer to successfully fulfil their volunteer role.</td>
<td></td>
<td>♦ Customer Relations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>♦ Provide support for volunteer</td>
</tr>
</tbody>
</table>

8. Training

<table>
<thead>
<tr>
<th>9. Review</th>
<th>Key Worker/Volunteer Co-ordinator/ volunteer support agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>♦ Assess all aspects relating to the volunteers performance</td>
<td></td>
</tr>
<tr>
<td>♦ Ensure the volunteer is clear on their role and responsibilities.</td>
<td></td>
</tr>
</tbody>
</table>
Trial Period Review

Name of Volunteer: ____________________________________________

Role: ________________________________________________________

Key Worker: __________________________________________________

Date: _________________________________________________________

1. Did you receive an induction? Yes/No

2. What format did it take and who carried it out?
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________

3. Did you receive your volunteer agreement and role description? Do you have any questions? Yes/No

4. Do you know what to do if there is a fire/accident? Yes/No

5. Are you comfortable with the tasks you have been given in your role? Yes/No

6. Are there any areas that you feel you lack the skills or experience needed to fulfil your volunteer role effectively? Yes/No
7. Do you think there is any training that you could take that would assist you in volunteering role?  Yes/No

8. Are you receiving adequate support in your role? Yes/No

9. How do you think that your current volunteer role has benefited you?

Next review date: __________________

Signatures

Key Worker: _______________________

Volunteer: _______________________
Annual Volunteer Review

Name of Volunteer: ____________________________________________

Role: ________________________________________________________

Date: _________________________________________________________

1. How has your volunteering been over the past 12 months?

________________________________________________________________

________________________________________________________________

________________________________________________________________

3. Are there any queries or issues with your role? Yes/No

Please Comment:

________________________________________________________________

________________________________________________________________

________________________________________________________________

3. Do you feel supported in your role? Yes/No

Please comment:

________________________________________________________________

________________________________________________________________

________________________________________________________________
4. Are there any training needs we can support you with? Yes/No

________________________________________________________

5. How do you think your current volunteer role has benefited you?

________________________________________________________

________________________________________________________

6. Are there any changes that you can suggest that would improve your volunteer experience and/or the service provided?

________________________________________________________

________________________________________________________

________________________________________________________

Next review date: ________________

-------------------------------------------------------------------------------------

Annual Volunteer Review

Name: ________________________________________________ (Key Worker)

Date: ________________________________________________

1. How has your volunteer been over the past 12 months?

________________________________________________________

________________________________________________________

________________________________________________________

2. Are there any queries or issues with your role or your volunteers?

Yes/No
Please Comment:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. How have you supported in your volunteer?
   Please comment:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

4. Are there any training needs we can support you with?
   Yes/No
________________________________________________________________________
________________________________________________________________________

5. How do you think your volunteer role has benefited your service?
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

6. Are there any changes that you can suggest that would improve your volunteer’s experience and/or the service provided?
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
PARENT / GUARDIAN CONSENT FORM

Parent / Guardian Consent Form

Name of Volunteer: ____________________________________________________________

Address: ____________________________________________________________

The above named has applied to become a volunteer with The Southern Health and Social Care Trust. As the above named person is under 18 years of age, we require the consent from a parent/guardian before any volunteering can commence. Therefore, it would be appreciated if you would complete the slip below and return it in the envelope provided.

Please note that should a volunteering role involve having substantial access to children and/or vulnerable adults, a criminal record check has to be carried out by the police before any volunteering can commence.

_________________________________________ * has/has not my permission to become a volunteer with The Southern Health and Social Care Trust.

*Please delete as appropriate

Signature: __________________________ Date: __________
Appendix 18

Volunteer Reimbursement of Expenses Procedure

The Investing in Volunteering standard regarding the reimbursement of volunteers states that a placement organisation (i.e. the Trust) should have “a clear policy on the reimbursement of volunteers’ out of pocket expenses which is rooted the organisational ethos, and which takes account of the organisation’s financial situation.”

The Southern Health and Social Care Trust (the Trust) values the contribution made by volunteers and supports the view that they should not be left “out of pocket” or financially worse off as a result of their volunteering. As such, the Trust will provide an efficient mechanism to reimburse volunteers for “out of pocket” expenses in keeping with the Department Finance Guidelines and Procedures and the Investing in Volunteering Standards.

This expenses procedure does not apply where members of the public attend a launch or similar event which is open to everyone. However, there may be exceptions to this, for example where a volunteer is actively involved in contributing to a seminar, conference, training event or launch event.

What expenses are covered?

The costs that a volunteer is likely to incur in the course of their volunteer duties should be discussed and agreed with the key worker before the commencement of the volunteer placement. This is simply to ensure that costs can be forecasted and budgeted for from operational budgets. All claim forms will be authorised by your keyworker and the authorised budget holder before any reimbursement is made. The following out-of-pocket expenses will be reimbursed:

**Travel**

- Reimbursement for travel currently offered at 27p per mile or on production of a valid bus or Community Transport receipt. Reimbursement for taxi fares will only be paid in exceptional circumstances at the discretion of and with prior approval from the Trust.
- Reimbursed travel expenses from home to the place of volunteering are not treated by the benefit system as income provided they are actual and not rounded up amounts. However the potential tax or benefit implications remain a matter for the volunteer concerned, in terms of his/her responsibility to inform the relevant agency.
- The Southern Health and Social Care Trust recommends that volunteers seek advice directly with the Benefits Agency for clear guidance.

**Requirements for Volunteers who transport service user/s in the course of their volunteer activity**

All volunteers who transport service user/s in the course of their volunteer activity e.g. Befrienders must fulfil the following requirements:

- Drive their own private motor vehicle (including motorcycles) i.e. belonging to the volunteer, their spouse, or partner;
- Have a valid Driving Licence;
• Provide evidence of motor vehicle insurance which covers the use of the vehicle on volunteering business, and which covers the following without financial limits:
  o Bodily injury or death of third parties
  o Bodily injury or death of any passenger and
  o Damage to the property of third parties
• All volunteers in this category must complete a letter confirming the above details and return this to their key worker. A template letter is attached as Appendix 19.

Subsistence

  o Volunteers can be provided with tea, coffee, meals and other refreshments, if this is during the course of volunteering. Where this is not provided, volunteers can be reimbursed the cost of their meals or refreshments that are incurred during the course of their volunteer activity should it be over a lunch or evening period provided that the volunteer activity is more than four hours, however this must be agreed in advance.
  o Subsistence allowances will be reimbursed on the production of receipts but in any case will be capped in line with those payable under Agenda for Change provided the volunteer activity is more than 4 hours:
    - Tea/Coffee Allowance
      Up to a maximum of 2.50
    - Lunch Allowance
      Up to a maximum of 5.00
    - Evening Meal Allowance
      Up to a maximum of 15.00

Administration

  o If a volunteer has specific tasks to undertake that require administration, in the first instance, the Trust by specific agreement on a case by case basis will provide the necessary resources. In exceptional circumstances, receipted costs for stationary, postage, photocopying and telephone calls may be met provided this has been agreed in advance.
  o Volunteers should submit receipts for entry fees when accompanying clients (e.g. to swimming pool, social or recreational activity). Prior approval will be necessary.
  o If protective clothing and/or a uniform is required in the course of the volunteer activity, this will be provided by the Trust.

Replacement Care costs

  o While the Trust provides reimbursement for the care of dependants under its interim Service User and Carer Reimbursement Guidance in relation to Personal and Public Involvement (PPI) activities, it does not normally provide reimbursement for the care of dependants for volunteers.
  o PPI activities require the involvement of service users and carers who are currently using the services. These activities normally take place at fixed times, or have to be completed within a specific period of time.
  o Volunteering, while open to everyone, can be organised flexibly to fit around a volunteer’s available free time and the Trust has a wide range of volunteer opportunities to accommodate choice. It is for this reason that the Trust
does not normally provide reimbursement for the care of dependants for volunteers.

**How are expenses paid?**

Expenses will only be reimbursed on receipt of a validated and signed volunteer expenses claim form. Volunteer claim forms should be offered by the keyworker to all volunteers working in their area. The claim form is attached to the policy as Appendix 20.

- The keyworker can assist people in completing the expenses claim form. For all public transport or subsistence claims, receipts must be provided.
- The volunteer expenses form (Appendix 19) must be completed and all relevant receipts attached.
- The volunteer signs the form and forward to their keyworker.
- The keyworker forwards the expenses form to the budget holder for authorisation.
- The completed expenses form is forwarded to the Finance Department for processing and copied to the Volunteer Coordinator for information.
- The completed form must be forwarded by the 10th of month.
- Volunteers should forward their expenses on a monthly basis.

Please note that volunteer expenses shall be taken from the budget of the facility/department who requested the volunteer.
Template Letter to confirm requirements for Volunteers who transport service user/s in the course of their volunteer activity

13 January 2014

Dear Sir/Madam

As part of the documentation requirements for the provision of voluntary driver transport service in the Southern Health & Social Care Trust area, and to assist in good practice and quality assure this provision, all voluntary drivers are asked to provide the required documentation for inspection on an annual basis.

It is imperative that all voluntary drivers submit the following documentation for inspection:

1. Copy of vehicle insurance
2. Copy of vehicle test certificate (if appropriate)
3. Copy of tax disc
4. Copy of Driver’s Licence details (including any criminal or motoring convictions in the past 5 years).

All of the documentation must be current for the vehicles that will be used on the voluntary drivers designated routes.

Please send your documents to Transport Services (above address) before Friday 24th January 2014. Thank you.

Yours faithfully

BARRY COLLINS
Head of Transport Services
**Volunteer Time Sheet and Expenses Claim Form**

<table>
<thead>
<tr>
<th>Date</th>
<th>Volunteer Hours</th>
<th>Training Hours</th>
<th>Particulars of Journeys</th>
<th>Type of transport used</th>
<th>Total miles</th>
<th>Public transport cost (please attach receipts)</th>
<th>Other</th>
<th>For office use only Miles @ rate</th>
<th>For office use TOTAL £</th>
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Total miles: ___________ Mileage rate: ___________ Total expenses being claimed: _______________

I declare that these expenses have been legitimately incurred as part of my volunteering with the Southern Health & Social Care Trust

Name of Volunteer: ____________________ Reason for Journey: __________________________________________

Address of Volunteer: __________________________________________________________

Volunteers signature: ___________________________ Date: ________________

Name of cost centre/ department that expenses are being taken from: __________________________________________

Managers/Head of Department’s signature: ___________________________ Date: ________________
Ending or changing of Volunteer Role

Dear Volunteer,

The Southern Health and Social Care Trust values the involvement of volunteers in its work and appreciates the time and commitment given to enhance the quality of care or service provided to its service users. We hope that you have enjoyed your volunteer role but in order to ensure that we continue to offer a high quality service we would be obliged if you would please complete whatever section of this form that applies to you, when you end or change your Volunteer role.

<table>
<thead>
<tr>
<th>Date of ending volunteering role (if applicable)</th>
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<tr>
<td>Date of changing volunteering role (if applicable)</td>
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<tr>
<td>New volunteering role &amp; placement location</td>
</tr>
</tbody>
</table>

Reason for termination/change

What did you enjoy most about your volunteer role?
What did you enjoy least about your volunteer role?

Have you any suggestions for improving the volunteer experience and/or service?

If you have any queries, or if I can be of any further assistance, please do not hesitate to contact me.

Thank you.

Yours sincerely

_____________________
Volunteer Co-ordinator
Reporting Breakdowns Guidance for Volunteer Drivers

During Normal Working Hours

If a volunteer driver's vehicle breaks down, between the hours of 8.00am and 5.00pm, Monday to Friday, the volunteer driver, after making sure that any passengers are being looked after and that the vehicle is secure, should telephone the Transport Services Department, Trust Facility in their area and give:
- vehicle details
- details of any passengers being carried
- exact location of the vehicle; and
- information on nature of the breakdown

The volunteer driver should remain with vehicle until alternative transport arrives for service users/passengers and then await their breakdown recovery service. Volunteer driver to inform Transport Services of availability when vehicle is repaired and they in turn are able to resume volunteer driver duties.

Out of hours

The volunteer driver should contact the switchboard at CAH or DHH who will contact Out of Hours Social Services to ensure the relevant measures are in place and an alternative provider ie Trust contracted taxi is engaged to complete the passenger's journey.