

## Volunteer Service Policy

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### Target Audience:

People who need to know about this document in detail	Authors & owners, Head of Patient Experience, Executives with responsibility for volunteering
People who need to have a broad understanding of this document	Board Members, Management Board Senior Leaders, Board Committees, Staff responsible for volunteers
People who need to know that this document exists	Staff, Public, CVC'S

### Integrated Impact Assessment:

Equality Impact Assessment Date & Outcome	Date: 17/03/2023
	Outcome: Approved
Welsh Language Standard	Regulations (No.7) 2018
Date of approval by Equality Team:	17/03/2023
Aligns to the following Wellbeing of Future Generation Act Objective	(Wales) Act 2015



### Disclaimer:

If the review date of this document has passed, please ensure that the version you are using is the most up to date version either by contacting the author or [CTM\\_Corporate\\_Governance@wales.nhs.uk](mailto:CTM_Corporate_Governance@wales.nhs.uk)

## **POLICY STATEMENT**

Cwm Taf Morgannwg University Health Board (CTMUHB) recognises the importance and valuable contribution of each and every volunteer for the benefit of patients, their relatives and carers and to support/complement the work of staff. The Health Board also recognises that volunteering can improve wellbeing and is a multi-way process which benefits volunteers, patients and the organisation.

### **It is our policy to:**

- ✚ Treat all volunteers fairly and with respect by promoting and emphasising our values and behaviours
- ✚ Develop volunteer roles that are meaningful and make a positive difference to our patients, relatives and carers and to complement the work of staff
- ✚ Recruit all Health Board volunteers utilising a robust process ensuring all necessary checks are completed in a timely manner and in line with governance
- ✚ Never use volunteers to replace paid staff
- ✚ Support volunteers to gain the most from their experience
- ✚ Ensure volunteering is safe and effective in line with all relevant policies and standards
- ✚ Ensure our volunteers receive a values-based induction and relevant training to support their role
- ✚ Develop measures that show the impact of volunteering across the Health Board

### **We expect volunteers to:**

- ✚ Respect the Health Board's values and behaviour principles, and adhere to the organisation's policies and procedures
- ✚ Treat everyone with dignity and respect
- ✚ Attend a values-based induction and mandatory training sessions, along with additional training as and when required
- ✚ Understand their role and principles as set out in the Volunteer Agreement  
**(Appendix 1)**

## **SCOPE OF POLICY**

This policy applies to all volunteers recruited directly by the Health Board's Volunteer Service and to employees working with volunteers.

CTMUHB recognises that Voluntary Organisations providing a service (such as RVS, Age Connect, and Stroke Association) are independent organisations with their own identities and values. Individuals who volunteer with these organisations will be subject to their own recruitment, selection and training procedures and are not covered by this policy, which will be set out in Planning and Partnerships Service Level Agreements.

## **ACCOUNTABILITY**

The Chief Executive is ultimately accountable for the safe provision of volunteering across CTMUHB. Executive accountability rests with the Executive Nurse Director ensuring volunteers are recognised and align to the organisations strategies, long term plans and championed at board level. Strategic direction and leadership for volunteering lies with the Senior Manager for People's Experience in line with national policy and best practice.

The Volunteer Service Team has centralised operational responsibility for the delivery of a safe, effective and robust volunteering programme. However, the success of volunteering projects and the retention of volunteers relies on the support of both the Volunteer Service and staff responsible for the delivery of volunteer roles.

## **PARTNERSHIP WORKING**

This policy supports the importance of partnership working between CTMU HB, local CVC'S and Third Sector Organisations and is intended to demonstrate their commitment of delivering strategic principles, outcomes and ambitions, along with the benefits of working in collaboration. In line with co-production the Volunteer Service has developed a Memorandum of Understanding (MoU) which supports joint working and is independent of any other formal or contractual agreements for example Service Level Agreements (SLA's) and not intended to be a binding legal agreement, rather a statement of their shared intentions and responsibilities.

## **DEFINITION OF VOLUNTEERING**

The Welsh Government definition of volunteering is:

"Volunteering is the commitment of time and energy for the benefit of society and the community and can take many forms. It is undertaken freely and by choice, without concern for financial gain"

There is no contractual obligation on the volunteers to attend or the organisation to provide regular volunteering duties.

## **IMPLEMENTATION**

There is a defined strategic approach in terms of priority areas for volunteer support across the Health Board, set out in the Volunteer Service Strategy and aligned to CTM's 2030 long term plan. The Volunteer Service has operational responsibility for the approval, implementation and formal development of new volunteer roles / initiatives and any changes / updates of existing volunteer roles.

Those considering the introduction of volunteers on their wards / departments ***will be required to:***

- ✚ Consider ways in which volunteers can complement the work of staff and help to support and improve the patients experience as part of their operational planning
- ✚ Ensure they discuss any intentions to involve volunteers or changes to an existing volunteer role with the Volunteer Service Team in the first instance, prior to taking any further action
- ✚ Complete and sign a volunteer pro forma application request form (**Appendix 2**) which will require details relating to the need for volunteers, tasks, number of volunteers, an identified named contact / contacts.
- ✚ Discuss and agree with Senior Management to cover the cost of volunteer out of pocket expenses e.g. travel expenses, as outlined in the pro forma disclaimer. The volunteer service will agree to pay the expenses during the pilot period (3 months). However, the ward or department completing the request form will be required to have systems in place to ensure cross charges can be made following the initial trial period.
- ✚ Consider a clearly defined draft role description stating the purpose of involving volunteers, specific detailed tasks and guidance on what would be considered to be outside the remit of a volunteer

***All volunteer role descriptions will be formally developed and approved by the Volunteer Service***

To ensure the safety of patients, volunteers and staff are at the forefront of any new and updated roles, volunteers are informed at induction of the importance of only undertaking tasks defined and agreed in the role description. If unsure to contact the volunteer service manager for any queries or concerns around these tasks and / or unsure of what would be considered outside the role of a volunteer.

## EQUALITY AND DIVERSITY

Under the Equality Act 2010, all service users have the right to be treated fairly and with dignity and respect. In order to avoid discrimination or putting any individuals or protected groups at a disadvantage, it is essential that needs are met and barriers can be removed to ensure a positive experience. Therefore, the volunteer service is committed to ensuring that opportunities are accessible to all and to make reasonable adjustments in order to remove barriers that may affect the ability for someone to undertake a volunteering role, **for further information refer to the Health Boards Equality and Diversity webpage <http://ctuhb-intranet/dir/Equality/default.aspx>**

## RECRUITMENT AND RETENTION

Information regarding the recruitment process (**Appendix 3**), roles available, contact details and further information will be available on the Volunteer Service section within CTMU HB's website. Following an expression of interest, volunteers must complete an application form and attend a semi-structured informal interview and will be selected based on their suitability for the role, matching their skills, talents and interests. The Volunteer Service is solely responsible for the recruitment and retention of all Health Board volunteers, with all requests for any new volunteer posts or roles being directed to the service.

The offer of a volunteer position is subject to the following checks:



***No volunteer may start in a role until all checks are satisfactorily completed***

## INDUCTION AND TRAINING

As part of the recruitment process volunteers must attend a values-based induction session delivered by a member of the Volunteer Service Team, Manager or appropriate representative. This provides a consistent approach and introduction to the organisation covering matters pertinent to volunteering including:

- Volunteer Roles
- Stereotyping
- Boundaries

The following provides an overview of mandatory topics which are also covered at induction and pertinent to volunteers to ensure they are able to carry out their role safely, adhering to the Health Boards learning and development framework:



Volunteers should be undertaken where possible by the ward/departmental manager. An orientation

checklist (**Appendix 4**) should be completed in a timely manner and a signed copy returned to the Volunteer Service for retention in the volunteer's personnel file.

## **REVIEW PERIOD**

In order that volunteers have an enjoyable and worthwhile experience and to enable any improvements or adjustments to be made where applicable, feedback forms form part of the introduction to volunteering and support the retention of volunteers across the organisation. Volunteers are informed at induction of the importance of feedback and that the volunteer service is contactable during office hours and a member of the team will be on hand to capture their comments or offer information or support if necessary.

## **TRAINING AND DEVELOPMENT**

Volunteers should have the option of ongoing training and development opportunities to support them in their roles. These opportunities can be delivered internally or externally of the organisation and identified via their specific ward / department or by the volunteer service. All additional training will be captured on the individual volunteers file and the volunteer service database. Future training dates will be offered via regular volunteering updates or the volunteer services closed Facebook page.

## **SUPPORT AND SUPERVISION**

The volunteer will be managed on a daily basis by an identified employee nominated by the ward / department manager and identified on the pro forma. In order that they receive appropriate and regular support and guidance. On arrival for each session every volunteer should be briefed about who is providing them with support on that day. Volunteers should have the opportunity to talk about their role with their named contact and Ward and department managers are responsible for ensuring that volunteers receive appropriate levels of support whilst undertaking their role. In addition, a member of the Volunteer Service Team will meet with the volunteer as and when required and be able to be contacted by phone and / or email to check on progress and provide additional support if necessary.

## **RECOGNITION**

It is vital that volunteers feel valued and respected both as individuals and in their roles. Ward and department managers are encouraged to ensure their volunteers are recognised and appreciated, this includes nominating for awards linked to CTM's recognition awards and Third Sector recognition events. In addition, the Volunteer Service Team will ensure the role of volunteers and their positive impact is promoted during national annual "Volunteer's Week" (1<sup>st</sup> – 7<sup>th</sup> June) and throughout the year. Partnership work with the Health Boards Communications and Engagement Team along with local CVC's support the development of promotional material in recognition of the commitment, dedication and impact of volunteers.

## **NEXT STEPS**

All volunteers leaving their volunteering role should give as much notice as possible by notifying the Volunteer Service Team. All volunteers leaving CTMU HB will be offered the chance to complete an exit questionnaire or attend an exit interview with a member of the Volunteer Service.

All volunteers are required to wear a uniform so that patients and visitors can easily identify Health Board volunteers and to ensure adequate infection control measures are in place. Uniform is paid for and supplied by the Health Board.

## **MAJOR INCIDENT (PANDEMIC / EPIDEMIC)**

In the event of a national or local pandemic or epidemic and under the guidance of the Health Boards Executive Team and Infection Prevention and Control Senior Management, the Volunteer Service has the right to withdraw their volunteers from Hospital sites and settings. The volunteer's health and safety is at the forefront of any decision made and actions taken are with their best interest in mind. Regular review of Government, local and national guidance will be strictly observed and all Health Board Volunteers will receive

regular updates on matters that may affect their ability to volunteer.

However, during this time the Volunteer Service Team will arrange meetings, these will be undertaken virtually/in-person to protect volunteer's dependent on guidelines at the time. Whilst Volunteers are stood down the Volunteer Service in line with the Senior Manager for People's Experience will make decisions on the best approach to keep volunteers engaged. The volunteer's new role may look very different to that undertaken prior to being stood down and every effort will be made to look at utilizing this support in different formats with the volunteer's involvement in this process. Volunteers will also be signposted and referred to local community volunteer centres and the All-Wales Volunteer Website, in order that they have the opportunity to support local community projects and help those in most need in their area. The Volunteer Service has the absolute right to stand down volunteers at any time if continuing to undertake their roles puts them at risk or potentially cause harm.

## **RAISING A CONCERN**

If a volunteer has concerns about the treatment of a patient, member of staff or any other individual at any time, the volunteer must pass the information on without delay to a relevant member of staff, for example, the person in charge at that time, the Ward or Department Manager, or the Patient Advice & Liaison Service.

In addition, they should always contact the Volunteer Service Team to pass details on.

## **VOLUNTEER DISPUTES, DISAGREEMENTS & TERMINATION**

Any problems involving a volunteer must be reported to the Volunteer Service Team, examples of which may include:

- A member of staff is concerned about the behaviour or conduct of a volunteer
- A member of staff is concerned about the capability of a volunteer

All problems will be dealt with fairly, consistently and transparently using our problem-solving procedure.

Occasionally it may be necessary to remove a volunteer from their role and ask them to stop volunteering. Once a volunteer has started in their role, deselection can only occur by following the problem-solving procedure (**Appendix 5**)

## **ABSENCE**

All sickness and holidays must be reported to the named contact e.g. ward or departmental manager and volunteer service as soon as possible.

In the event that the volunteer has not notified the ward / department or volunteer service that they are unable to undertake their shift for a period of more than 2 weeks, they will be contacted by the volunteer service to ensure there are no concerns or reasons preventing them from being able to carry out their role.

In the event that a volunteer has to take long term sickness absence e.g. after surgery appropriate cases will be referred to the Health Board Occupational Health Team before the volunteer is able to return to their role. The referral and assessment are necessary to ensure the volunteer is fit and well and able to return to their role, furthermore, to evaluate whether any reasonable adjustments will need to be implemented in order that the volunteer is able to undertake their tasks.

## **LONE WORKING**

Volunteers must never undertake their role alone with patients in isolated areas (such as cubicles or behind curtains) without the authorisation of the ward or departmental manager. With the exception of Volunteer Drivers due to the role requiring them to transport clients to and from Day Units etc. The Volunteer Service driver's handbook provides clear guidance on the expectations of a volunteer driver and who to contact in an emergency or for additional advice or guidance, details of which can be found in (**Appendix 6**)

## RISK ASSESSMENT

All volunteering roles and activities will be risk assessed by ward or departmental managers, unless managed directly by the Volunteer Service Team, all volunteers will be informed of general health and safety requirements along with personal safety procedures.

A signed copy of the completed risk assessment form will be forwarded to the Volunteer Service Team for audit purposes.

## CONFIDENTIALITY AND GDPR

Volunteers are expected to uphold the same confidentiality standards as employees and during the course of volunteering, service users and colleagues may reveal confidential information about themselves for example: home address, telephone number or personal details about their life or circumstances. It is important for people to feel confident that that information **will not** be passed on to anyone without their permission. It is equally important for people to feel confident in giving us this information so we can deliver the best possible service.

**On no account** must identifiable information be divulged by a Health Board volunteer to anyone either verbally, in writing or via social media. Discussions should only be held with authorised staff, who are directly concerned with the patient's healthcare. If a Volunteer is in any doubt whatsoever as to the authority of a person or body asking for information of this nature, or aware of a breach of confidentiality, they are informed at induction to report this to the department/ward manager, person in charge and Volunteer Service Team.

As part of the recruitment process all volunteers regardless of role are required to sign a copy of the Volunteer Service confidentiality agreement (**Appendix 7**) to show that they fully understand the need for confidentiality, agree to keep information confidential and the standards expected within CTMU HB and elsewhere.

## SOCIAL MEDIA

Health Boards across Wales recognise the role and value of social media as a means of communication and of improving the way it reaches out and interacts with different communities, internally and externally. However, with the increased use of these networks, organisations have a responsibility to ensure the security of its information is protected and its reputation maintained. The Health Board recognises that individuals have a right to express themselves and the use of social media, However, employees and volunteers should be aware of the potential consequences of posting content on to publicly accessible and adhere to national policy.

The Volunteer Service provide guidance on the best use of social networks at induction sessions to ensure volunteers fully understand the blurring of boundaries between their private life and their role as a volunteer. Volunteers are advised at induction about the implications of the misuse of these types of platforms and the damage it can cause, in terms of their reputation as well that of others, including family, friends, colleagues and service users. The Volunteer Service provide regular updates, information, training opportunities and forthcoming events on their closed Facebook page which only allows registered Health Board Volunteers to join and is used under strict rules, including control and authority over any new members or posts, refer to the NHS Wales Social Media Policy for further information

[http://ctuwb-intranet/Policies/\\_layouts/15/WopiFrame.aspx?sourcedoc={A8B9EDFC-4761-4BBD-BDB2-D0517DC6E3EE}&file=Social%20Media%20Policy.doc&action=default](http://ctuwb-intranet/Policies/_layouts/15/WopiFrame.aspx?sourcedoc={A8B9EDFC-4761-4BBD-BDB2-D0517DC6E3EE}&file=Social%20Media%20Policy.doc&action=default)

## **LIABILITY**

CTMU HB aligns to the All-Wales Policy for the use of insurance, contract management and the indemnity arrangements for the financial administration of potential losses and special payments. The principles and scope of the policy includes volunteers carrying out agreed roles within the organisation and covered by public indemnity insurance through Welsh Risk Pool.

## **OUT OF POCKET EXPENSES**

Health Board volunteers are entitled to out-of-pocket expenses and the Volunteer Service is responsible for providing information and guidance, relevant forms should be completed and cross referenced with timesheets for audit purposes. All volunteers are entitled to receive the current rate for expenses in line with Welsh Government guidance, refer to webpage for further information regarding volunteer's rights and expenses:

Volunteer opportunities, rights and expenses: Pay and expenses - GOV.UK ([www.gov.uk](http://www.gov.uk))

In terms of public transport e.g., bus, train, the full amount of journey will be reimbursed in full. The volunteer must retain and provide a copy of the receipt of travel and will not receive travel expenses without this. The reimbursement for meal allowances is only payable where a volunteer has agreed with the Volunteer Service and ward / department to volunteer for longer than initially agreed e.g. undertaking a full day shift.

Further information about expenses / timesheets procedure is set out in **(Appendix 8)**

## **SECURITY**

It is the responsibility of the volunteer to ensure that on arrival of their agreed shift that their valuables and cash are in a safe place. CTMUHB will not be held responsible or liable for any claims arising as a result of any loss. Volunteers are informed of this at induction and advised to only carry a small amount of cash if needed and the requirement to avoid wearing personal items of any value.

## **RECORDS AND DATA PROTECTION**

Individual electronic records will be kept for all CTMUHB's volunteers. This will include personal information and training records. These are held on the Volunteer Service works drive and only accessible to the Volunteer Service Team. Individual paper copies held for volunteers e.g., files, are stored in the Volunteer Centre office which is locked outside of office hours and only accessible by authorised staff e.g. Volunteer Manager, Volunteer Coordinator, Volunteer Service Administrator and on site Security Officers. All records will be stored, retained and disposed of in accordance with CTM's Information Governance and GDPR data Protection Act.

## **POLICY IMPLEMENTATION**

The updated Policy and Equality Impact Assessment will be approved by CTMUHB generic Corporate Policy Approval Group.

## **MONITORING AND AUDIT PROCEDURES**

The Volunteer Service Team will monitor compliance within this updated policy under the leadership of the Senior Manager for People's Experience.

## **POLICY REVIEW**

This document is valid for three years (2023 -2026) however, the volunteer service



team will regularly keep the policy under review to ensure it is up to date with regulations, best practice and the delivery of the volunteer service is consistent and effective.



(Appendix 1)

## **Volunteer Agreement**

This agreement sets out what you as a volunteer can expect from our organisation to ensure your volunteering experience is worthwhile, rewarding and mutually

beneficial.

## **Cwm Taf Morgannwg University Health Board**

We, Cwm Taf Morgannwg University Health Board (CTMUHB) Volunteer Service commit to:

- Provide you with a 'values-based' induction to meet the requirements of the health board along with any ongoing additional training.
- Provide access to the health board's Occupational Health services as and when required.
- Ensure you have access to and support from the Volunteer Service should you experience any problems whilst undertaking your volunteering role.
- Support your development whilst volunteering with us.
- Reimburse reasonable, agreed, out-of-pocket expenses as stated in the volunteer policy.
- Provide you with an ID badge and uniform as required, which will need to be worn at all times whilst undertaking your volunteering role.
- Update you on health board changes that may affect your volunteering role.
- Provide health board insurance cover whilst on duty.
- Provide a reference and/or authorisation to apply for internal posts within CTMUHB, provided the agreed volunteer time commitment has been fulfilled.
- Ensure you are treated fairly in accordance with the health board's Equal Opportunities policy.
- Attempt to resolve any problems that may arise in a timely manner. In the event of an unresolved issue, we will initiate the health board volunteer 'problem solving' procedure.

***Cont'd***

## **The Volunteer**

I \_\_\_\_\_ agree to:

- Respect the health board's values and behaviour principles and adhere to the organisation's policies and procedures.

- Maintain patient, family and colleague confidentiality by not discussing or disclosing personal information as stated in the confidentiality agreement and to adhere to the General Data Protection Regulations (GDPR).
- Perform my volunteering role to the best of my ability.
- Inform the Volunteer Service of any changes to my personal circumstances which may affect my Disclosure & Barring Service status.
- Meet my volunteering time commitments to the best of my ability and give reasonable notice when unavailable.
- Attend induction and mandatory training sessions, along with additional training as required.
- Wear issued volunteer uniform and identity badge at all times whilst undertaking my volunteering role.
- Return all property issued by the health board when I stop volunteering, including my identity badge, uniform and any other items supplied by the organisation.
- Fulfil the agreed volunteer time commitment before applying for internal posts within CTMUHB and to provide the details of the Volunteer Manager as a referee when doing so.
- Sign in and out of each shift when undertaking my volunteering role.
- Notify the Volunteer Service of any changes to my personal details or circumstances, including physical or emotional wellbeing that could impact on my ability to undertake my volunteering role safely.
- Inform the Volunteer Service if I am no longer able to volunteer or need to take a break for a set period.

This agreement is binding in honour only and is not intended to create a legally binding contract, and may be cancelled at any time at the discretion of either or both parties.

**Name:** .....

**Signed:** .....

**Dated:** .....



**GIG**  
CYMRU  
**NHS**  
WALES

Bwrdd Iechyd Prifysgol  
Cwm Taf Morgannwg  
University Health Board

**(Appendix 2)**

**Cwm Taf Morgannwg University Health Board**  
**New Volunteering Role Request**

Thank you for showing an interest in including volunteers on your ward/department. In order to assess the suitability of the role that you have in mind, please complete the details requested below and return to the Volunteer Service Department (ctuhb\_volunteering@wales.nhs.uk)

Please note the following requirements:

- Volunteer roles should not replace paid members of staff.
- Volunteers are recruited to enhance patient experience and therefore any service delivery should not essentially depend on volunteer attendance
- All departments involving volunteers are required to nominate a staff member who will act as a buddy/mentor to the volunteers
- Any departmental specific training will need to be provided locally

Name of person completing this form:	
Ward / department / unit name:	
Telephone Number / extension:	
Email address:	
Date of request:	

Why would you like volunteer support for your area:

--

Please describe what tasks you want the volunteer(s) to do:

--

Please explain how this will benefit the patient experience and the department:

--

What days and times do you require volunteer support?

	AM	PM	Evening
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Sunday			

Who will supervise the work of the volunteer(s)?

Will the role involve working in the community?    Yes / No  
If yes please give details:

Thank you for completing this form – a member of the central volunteering team will be in contact to discuss further.



After the interview we will be in touch to let you know if you have been successful. If the role is deemed not suitable to your interests we will sign post you to your nearest community volunteer centre who can assist you with finding a suitable role. If successful you will be contacted by the volunteer centre to inform you of the next steps. Please note that from this stage it may take a few weeks depending on priorities and service demand before we complete all necessary checks and training before you can start volunteering.



**Attend a volunteer information session (on line or face to face) If interested you will be required to complete an application form. If your application is successful you will be invited to attend an informal interview. This will either be a virtual on line interview or face to face.**



#### **Documentation:**

We will send you all necessary documentation including an occupation health check form. You will be required to complete and send to our occupational health team. You may receive a telephone call or appointment for a quick assessment dependent on your medical history. We will also need references so will be required to get permission from your referees in readiness.



#### **Documentation:**

You will be required to complete a DBS criminal record check. Guidance will be provided on how to do this. If you have received a conviction or caution, we encourage you to be up front and honest. It does not mean that you will be unable to volunteer, but will be dependent on the nature of this. The volunteer service can offer guidance and a one to one confidential meeting to discuss any concerns or worries.



#### **Next Step:**

As part of your induction into our organisation you will need to attend a local orientation to your ward / department. This will be arranged by the volunteer service and you will have the opportunity to meet your named contact who will offer you support during the course of your volunteering.



#### **Training:**

In line with our recruitment process, you will be invited to attend an induction session. This will either take place on line or face to face classroom based and will cover all necessary topics relevant to your volunteering role. You will be issued with a uniform and arrangements made for an ID badge, you will also receive guidance and documentation to complete in order for you to claim travel expenses and your timesheet, which is important as a record of shifts undertaken.

*Welcome*

**Once all of the above has been completed you are now ready to start your volunteering journey with us.  
Welcome to volunteering at Cwm Taf Morgannwg University Health Board**



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NHS  
WALES

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Cwm Taf Morgannwg  
University Health Board



**(Appendix 4)**

### **New Volunteer - Local Orientation Checklist**

Please see below details of a new volunteer who is now ready to start in your area. This checklist is to be completed during their first shift and retained by the department. The sign off sheet should be returned to the Volunteer Centre at Glanrhyd Hospital where it will be placed in the volunteer's personnel file. Details of which can be found at the bottom of this form.

<b>Volunteer Contact Details</b>	
Name	
Telephone	
Mobile	
E-Mail	
Emergency Contact Name & No	
Relationship	
Volunteers Signature	

<b>Ward / Department</b>	
Hospital Unit / Site	
Ward / Department	
Volunteering Commencement Date	
Date Local Induction Completed	
Local Induction completed by	
Staff Signature	

<b>Local Orientation Checklist Action</b>	<b>Tick all appropriate topics covered</b>
<b>Reception</b>	
New volunteer received by:	
Introduction to Ward/Unit Manager	
Introduction to staff	
Location of volunteer signing in and out form	
Department layout	
<b>Health &amp; Safety</b>	
Fire procedure – location of fire alarms, fire panels, fire exits and an explanation of the testing times for fire alarms.	
Emergency first-aid, identification of first-aiders and location of first-aid box.	
Accident and incident reporting procedure	
Security/responsibility of personal property	
Hand washing (Demonstrate)	
Non handling of sharps/clinical waste	
Control of infection	
Protective clothing & skin sensitivity	
Correct use of personal protective equipment	
Cleaning products e.g., wipes	
Food hygiene and service	
Use of kitchen equipment	
<b>Volunteer Shift Arrangements</b>	
Arranging shifts	
Reporting in for shift instructions	
Location of break rooms and toilets	
Duties and responsibilities outlined	
Sickness/absence procedures	
Access to copies of policies & procedures	
<b>Dealing with Clients &amp; Visitors</b>	
Complaints/concerns procedure	
Confidentiality	
Patient feedback forms and post boxes	
<b>Volunteer Support &amp; Development</b>	
Identification of a named contact to support volunteer	
Additional training opportunities	
<b>Additional Information</b>	
Please add any other topics covered pertinent to your individual ward or department:	

Once completed please return to:  
**Volunteer Centre**  
**Glanrhyd Hospital**  
**Bridgend**

[CTUHB\\_Volunteering@wales.nhs.uk](mailto:CTUHB_Volunteering@wales.nhs.uk)  
**01656 753781 / 753783**



## **(Appendix 5)**

### **Cwm Taf Morgannwg University Health Board (CTMUHB)**

#### **Volunteer Problem Solving Procedure**

##### **Introduction**

Volunteers are essential to the work of CTMUHB and our aim is to provide a positive volunteer experience for everyone who gives their time and provide volunteer opportunities that make a difference. To make sure that we succeed in this aim, we need to be able to address any problems affecting or involving a volunteer and identify ways of learning and improving how we work together.

All volunteers should have a named contact who is responsible for supporting the volunteer on a day-to-day basis. Most problems can be resolved successfully without the need for a specific policy or procedure by making sure that volunteers and the named contact regularly discuss how the volunteer role is progressing.

However, some problems are not resolved easily and informally. This procedure aims to make sure that problems are addressed consistently, in a timely manner, and in a way which ensures everyone involved is treated with respect and feels safe in raising concerns and problems.

We expect a volunteer to raise any issues in good faith and to co-operate with their named contact and the Volunteer Service Team to resolve the issues by means of this procedure.

#### **1. Scope**

The procedures outlined are to be used when dealing with problems or concerns that relate to volunteers in relation to their volunteering role or status as representatives of CTMUHB

For example, this procedure is used when

- A volunteer is unhappy with their role
- A volunteer is unhappy about the behaviour of another volunteer or employee
- There are concerns about the competence of a volunteer
- There are concerns about the behaviour of a volunteer

To be clear, staff grievance and HR disciplinary processes can never be used to address issues relating to volunteers.

If an external complaint is made about a volunteer, it should first be addressed using the putting things right procedure. Otherwise, this procedure should be used to address any concerns.

## 2. Problem Solving Principles

Whenever there is a problem affecting a volunteer, our aim is to:



Volunteers who, in good faith, report concerns about serious malpractice either internally using this procedure, or externally to the relevant authorities are protected by our Whistleblowing policy

### Problem Solving Procedure

Definition – for the purposes of the procedure the named contact relates to the member of staff who manages the volunteer on a day-to-day basis e.g., ward / department manager. The Volunteer Service Team consists of a Volunteer Manager, Volunteer Coordinator and Administrator

#### Stage 1 – Informal process

Most problems can be dealt with through day-to-day discussions and supervision. If a problem occurs the named contact should seek to resolve this as soon as possible. The sooner a problem is addressed the more likely it is to be resolved locally and informally.

The named contact should seek advice immediately from the Volunteer Service Team and agree with the volunteer how to resolve the problem. This should include timescales over which any changes will be introduced and how they will be monitored and should always be explicit about any changes or improvements expected and keep a brief note of any relevant discussions and agreements.

In some cases, it may be impossible to resolve a problem informally. Examples include where:

An informal agreement has failed to improve e.g. a volunteer continues to arrive late despite having agreed to be on time

A volunteer and named contact cannot agree on a suitable resolution to a problem e.g. a volunteer feels that the named contact has not dealt with a dispute appropriately

A problem is serious and has the potential to damage the reputation of CTMUHB e.g. a volunteer is alleged to have been drunk whilst volunteering

**• In these circumstances the problem moves to stage 2**

## **Stage 2 – Structured process**

The problem should be put in writing to the Volunteer Service Team. Discussions will be undertaken to decide on which staff member should deal with the problem. In most cases this will be either be the volunteer co-coordinator or the manager but may be another suitable employee if appropriate e.g. The Senior Manager for Governance and Patient Experience

This identified Volunteer Service Team member should carry out a suitable investigation e.g., talking to anyone who witnessed the situation that led to the problem – and understand why the informal process has not resolved the problem.

The volunteer should be invited to a meeting to formally discuss the problem. The invitation must make the purpose of the meeting clear. A volunteer may be accompanied by a friend to offer emotional support if required but not mandatory. During the meeting the staff member will discuss the problem in detail and ask further questions as required and detailed notes should be taken of all relevant information.

After the meeting has taken place, the named person dealing with the concern will write to confirm their understanding of the problem, and the actions to be taken to resolve it and the letter will explain why they believe this to be a reasonable and fair response.

The letter will also explain who to contact if they disagree with the response, this will be a more senior manager and should normally take no more than three weeks to complete.

### **Stage 3 – Appeal**

If a volunteer feels the outcome of Stage 2 is unfair or unreasonable, they have 14 days from the date of the letter explaining the outcome of Stage 2 to appeal.

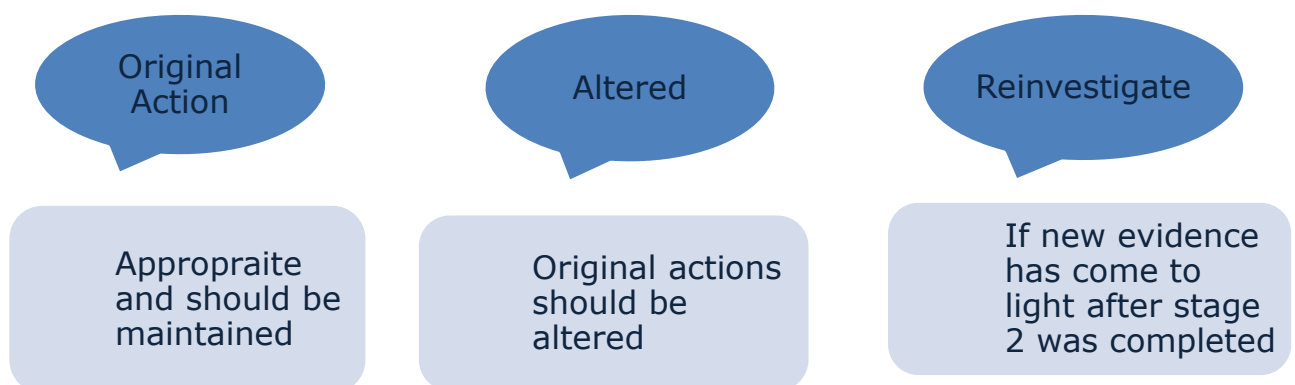
The volunteer should write to the senior manager named in the letter setting out the reasons why they feel the outcome is unreasonable.

- The senior manager will review the evidence collected in stage 2 and the actions to resolve the problem
- The senior manager will invite the volunteer and manager to a meeting. The volunteer may be accompanied by a friend to offer emotional support

During this meeting the volunteer will be asked to explain why they feel the outcome is unreasonable and the manager will be asked to explain why they believe it to be reasonable. The appeal should not rehear the evidence about the original problem – the appeal aims to decide whether the actions put in place by the manager are reasonable and proportionate.

Following the meeting, the senior manager will make a final decision on the outcome and write to the volunteer and the Volunteer Service to explain their decision.

The decision may be:



### **There is no further right of appeal following this decision**

The stage 3 process should normally take no more than 3 weeks, so the whole process should take no longer than 8 weeks unless there are unforeseeable delays.

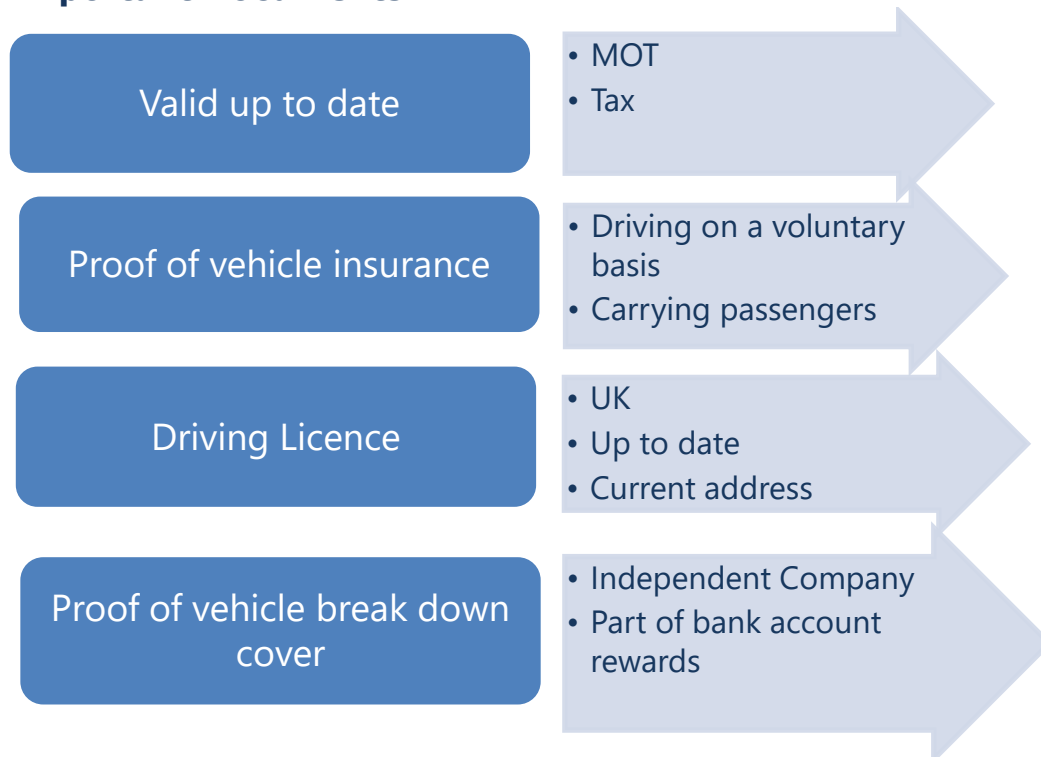
## **Ending a Volunteer's Involvement**

The procedure set out above should always be followed before ending a volunteering relationship unless there are exceptional circumstances.

Exceptional circumstances are where the matters are serious and trust in the relationship has been lost. This would include situations where the volunteer has caused damage or financial loss or is potentially involved in criminal or antisocial behaviour. In such circumstance a volunteer placement and agreement may be ended without following this process. This can only happen with the agreement of the Director responsible for volunteering in the Health Board.

Whilst the Health Board is responsible for the management and assurance of this handbook, it is ultimately the responsibility of the volunteer to provide the following documents on an annual basis or any document changes within 7 days. If these documents are not forthcoming then volunteers will not be allocated any patients until such time as the documentation is received.

## Important Documents



- In addition, it is also the responsibility of the volunteer to inform the volunteer service and named contact of any subsequent endorsements or convictions which must be reported immediately
- All volunteer drivers are required to have fully comprehensive insurance cover at all times whilst carrying out their duties, which will need to include business miles in order to claim out of pocket travel expenses
- CTMUHB does not accept any responsibility or liability for damage or injuries to either volunteers or patients incurred whilst operating under the scope of the vehicle insurance.
- It is essential that volunteers ensure that they obtain a letter of authority from their insurance company confirming that they are covered to undertake voluntary car driver activity with full passenger liability
- The volunteer driver must make it clear to their insurance company that they will only receive out-of-pocket expenses and that the vehicle is not used for commercial purposes
- The volunteer through their insurance company, will pursue all claims for damage or injury resulting from Road Traffic Accidents



- Any fine incurred, whilst acting as a volunteer, is the responsibility of the individual. Volunteers must comply with motoring law and any relevant parking regulations
- Where appropriate volunteers are required to have an annual health check. This will be arranged by the contact lead and undertaken by the Health Boards Occupational Health Department
- All Volunteer travel expenses must be logged and signed off on the volunteer service travel expenses / timesheet form **Appendix 1**. This must be submitted to the volunteer service on a monthly basis, no payments can be made without completion and submission of appropriate form
- Volunteers will be paid in line with current Welsh Government travel expense mileage allowance as indicated below:

Vehicle	First 10,000 miles	Above 10,000 miles
Cars and Vans	45p	25p
Bikes	20p	20p
Motorcycles	24p	24p
Passenger Payments	5p	Passengers (this can be claimed as well as the car and van mileage rates)

## Referral Procedure and Contacts

Drivers will receive details of clients requiring transport by their named contact. The information will be received by phone, or by prior arrangements and will include:

- Client's name
- Contact details
- Address (including postcode),
- Time of pick up and drop off

## Emergency Procedure

The volunteer Driver will be responsible to ensure they call 999 immediately in the case of an emergency and will be informed of situations that may require urgent action by their contact lead in the area that they provide their services. The following are a few examples of what is classed as a medical emergency or serious injury:

- Loss of consciousness
- An acute confused state



- Fitting
- Breathing difficulties
- A suspected heart attack or stroke, **every second counts with these conditions**

We recommend that you carry sick bags and bottled water in the vehicle in the event that you or your passenger may be feeling nauseas.

In March 2020, the UK went through extraordinary times due to a pandemic. If you are required to provide transport during unprecedented times your named contact will be responsible for updating all their drivers with current Government and Health Board precautionary measures and infection prevention guidance at that time. If required your named contact will also provide you with appropriate Personal Protective Equipment (PPE).

### **Drive Safely**

Ensure the vehicle remains safe and road-worthy. You should carry out basic vehicle maintenance checks at the start of every shift. This should include a visual check on all lights, oil and water levels, tyres, mirrors, seat belts and access ramps (where applicable).

It is important to note that this is a transport service to drop off and collect and not a service providing chaperone or assistance helping passengers into their appointment such as pushing wheelchairs, please inform staff within the area if your passenger requires support getting into their appointment.

### **Reassurance and awareness**

We recognise older people need to identify staff for reassurance. For these purposes you will be issued with a uniform e.g., polo shirt, fleece jacket, lanyard with a photograph ID name badge and a notice to display in your vehicle advising that you are driving on behalf of Cwm Taf Morgannwg University Health Board






**(Appendix 7)****Volunteer Confidentiality Agreement**

During the course of your volunteering, service users and colleagues may reveal confidential information about themselves. This could be their home address, telephone number or personal details about their life or circumstances. It is important for people to feel confident that information they give **will not** be passed on to anyone without their permission. It is equally important for people to feel confident in giving us this information so we can deliver the best possible service.

**On no account** must identifiable information be divulged to anyone either verbally, in writing or via social media. Discussions should only be held with authorised staff, who are directly concerned with the patient's healthcare. If you are in any doubt whatsoever as to the authority of a person or body asking for information of this nature, or you become aware of a breach of confidentiality, you must seek advice from or report to the department/ward manager or Volunteer Service Team.

We ask all volunteers within our health board to sign a copy of the statement below to show they understand the need for confidentiality and agree to keep information confidential within Cwm Taf Morgannwg University Health Board and elsewhere.

I, the undersigned, do willingly promise to hold in confidence all the matters that come to my attention whilst volunteering with Cwm Taf Morgannwg University Health Board, including information about any patient or other persons using the services of, or working within the health board.

-  I will respect the privacy of service users, other volunteers and staff, and confer appropriately with those designated as my supervisors.
-  I will use all information gained in the course of my service in a responsible manner.
-  I understand that information relating to patients is strictly confidential and must never be divulged or discussed outside of the hospital.
-  I will adhere to the All-Wales Social Media policy.
-  I understand that misusing information will lead to my suspension or dismissal.

Name: .....  
Signed: .....  
Date: .....

**(Appendix 8)**

## Volunteer Service



**GIG**  
CYMRU  
**NHS**  
WALES

Bwrdd Iechyd Prifysgol  
Cwm Taf Morgannwg  
University Health Board

## Volunteer - Monthly Timesheet

Full Name \_\_\_\_\_ Hospital / Base \_\_\_\_\_

Ward / Unit \_\_\_\_\_ Days \_\_\_\_\_ Times \_\_\_\_\_

[illegible]

In order to receive your travel expenses, please complete the claim form overleaf. Please note that all expenses must be claimed on a monthly basis, be completed and signed in full. Remember that fares other than mileage must be supported by an official receipt and/or ticket.

## Volunteer - Claim For Out Of Pocket Expenses

Full Name \_\_\_\_\_

Address \_\_\_\_\_ Post Code \_\_\_\_\_

[illegible]

Total Claimed