

Policy Checklist

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| Name of Policy & Procedure: | Volunteer Policy and Procedures |
| Purpose of Policy: | The purpose of this policy is to provide guidance on the appropriate involvement of volunteers within the Southern Health & Social Care Trust. |
| Directorate responsible for Policy: | Older People & Primary Care |
| Name & Title of Author: | Head of User Involvement and Community Development Volunteer Co-ordinators |
| Does this meet criteria of a Policy? | <u>Yes</u> /No/Not Applicable |
| Trade Union consultation? | <u>Yes</u> /No/ <u>Not Applicable</u> |
| Equality Screened by: | Head of User Involvement and Community Development Volunteer Co-ordinators |
| Date Policy submitted to Policy Scrutiny Committee: | |
| Members of Policy Scrutiny Committee in Attendance: | |
| Policy Approved/Rejected/Amended | |
| Communication Plan required? | Yes – to be made available on Trust website/SharePoint and brought to the attention of all staff by featuring in Southern I and cascading through the line management structure. |
| Policy Implementation Plan included? | N/A |
| Any other comments: | |
| Date presented to SMT | |
| Director Responsible | Director of Older People & Primary Care |
| SMT Approved/Rejected/Amended | |
| SMT Comments | |
| Date received by Employee Engagement & Relations for database/Intranet/Internet | |
| Date for further review | |

| POLICY DOCUMENT – VERSION CONTROL SHEET | |
|--|---|
| Title | Title: Volunteer Policy and Procedures Version: 3_0 Reference number / document name: |
| Supersedes | Supersedes: The Legacy Trust's volunteer policies; SHSCT Volunteer Policy Version 1_0 (Dec 2008) and version 2 (May 2014) |
| Originator | Name of Author: Head of User Involvement and Community Development Volunteer Co-ordinators |
| RM / Policy Committee & SMT Approval | Referred for approval by: AD Promoting Wellbeing Date of Referral: RM / Policy Committee Approval: SMT Approval: |
| Circulation | Issue Date: Circulated By: Issued To: |
| Review | Review Date: August 2021 Responsibility of (name): Title: Director of Older People & Primary Care |



Southern Health
and Social Care Trust

Quality Care - for you, with you

VOLUNTEER POLICY & PROCEDURES

| | |
|----------------------------|--|
| Author | Head of User Involvement and Community Development Volunteer Coordinators |
| Directorate Responsibility | Older People & Primary Care |
| Date | June 2021 |
| Review Date | June 2024 |

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1 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 in the local community.
- 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.

2 DEFINITION OF VOLUNTEERING

- 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)

3.0 AIMS AND OBJECTIVES

- 3.1 The aim 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 2016-2018
- 3.2 The objectives 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 The Trust also recognises the important contribution volunteers are making in sustaining and promoting health and wellbeing, community development and the many vital health and social care services they deliver. The Trust will seek to provide a local environment for volunteering which will enable it to grow.
- 4.3 The Trust 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.
- 4.4 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 by providing a complementary role alongside that of paid staff.
- 4.5 Volunteers bring with them their own skills and talents, while increasing their own personal growth and development.
- 4.6 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.
- 4.7 The Trust is committed to serving the entire population in the southern area and wishes to see all sections of the community represented among its volunteers. Volunteer opportunities are widely promoted and the Trust endeavours to make recruitment and selection materials available in a format accessible to any individual or group, upon request. Furthermore the Trust regularly reviews its volunteer database to identify and target any under-represented group(s).
- 4.8 Organisations contracted with the Trust to deliver social care services are required to encourage and promote voluntary activity whilst also operating a best practice system in respect of volunteer management in line with the contract.

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 IN REGARD TO THE POLICY

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, Service 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 Coordinator

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.

6.6 For clarity, the following key operational positions in regard to the implementation of this policy and procedures are defined:-

6.6.1 **Head of Service User Involvement and Community Development** - is the strategic and operational lead for volunteering across the Southern Health and Social Care Trust.

6.6.2 **Trust Volunteer Coordinator** - The Volunteer Coordinator will be responsible for driving, enabling and facilitating the volunteering service across their locality by working in partnership with volunteers, staff, service users, carers and the wider

community and voluntary sectors. The post holder will also support the implementation and ongoing development of the Trust's Volunteer Policy and Procedures in line with the Regional Volunteering Plan for HSC (PHA 2015) by providing strategic and operational development and delivery support in order to significantly enhance the Trust's current Volunteer Service.

6.6.3 **Service Manager** – is responsible for identifying areas within their service where a volunteer could be placed, liaising with the relevant Volunteer Coordinator to develop an appropriate role description and ensuring that a Key Worker is identified to support and supervise the volunteer as outlined in 2.5 below.

6.6.4 **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 by completing quarterly return on volunteer activity.

6.6.5 **Volunteer Support Agency** - is an external organisation contracted by the Trust to provide agreed recruitment and support for volunteers in line with the Trust's Volunteer Policy and Procedures.

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 A fair, effective and open volunteer recruitment and selection process and assurance that volunteer roles are not job substitutions;

8.1.2 Specific information on the volunteer role including relevant legislation (as detailed at section 9) relevant Trust policies and procedures and guidelines on how to carry out the volunteer role ;

- 8.1.3 Corporate and local induction and appropriate training to help the volunteer fulfil their volunteering role;
- 8.1.4 A trial period to see if the role is suitable and to resolve any problems that may arise;
- 8.1.5 Choice and flexibility -The opportunity to say no, opt out or to change tasks if he/she is unhappy in the voluntary role;
- 8.1.6 Clearly defined role of a Trust Volunteer Coordinator and regular support and supervision from a named key worker so the volunteer knows who to go to if they have a problem;
- 8.1.7 Volunteer Newsletter/Update emails;
- 8.1.8 Reimbursement of out of pocket expenses*;
- 8.1.9 Provision of relevant equipment and uniforms including protective clothing where appropriate e.g. Volunteer Polo shirt (all volunteers), Volunteer fleece (Here to Help), apron (mealtime support), PPE where & when relevant e.g. masks, gloves, visors;
- 8.1.10 Safe and healthy volunteering and appropriate indemnity arrangements through a volunteer agreement;
- 8.1.11 Respect for diversity where people are treated fairly and equitably;
- 8.1.12 Assurance that during times of industrial action, you may continue with your volunteer role but will not be asked to do the work of paid staff nor to undertake additional duties outside your agreed role;
- 8.1.13 Volunteer Recognition Events
- 8.1.14 An annual review of the volunteer role.

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. To not to attend their volunteer role if feeling unwell;
- 8.2.3 To always act on and within the advice of the key worker within the boundaries of their role description;
- 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 role;
- 8.2.7 To respect confidentiality both while volunteering and thereafter;
- 8.2.8 To be aware of your responsibilities under the Data Protection Act 2018 and the duty of confidentiality you owe to patients and clients. You are also responsible for adhering to the Trust's policies and procedures on Information Governance.
- 8.2.9 To highlight any issues that may contribute to the delivery of better services or a better patient/service user experience;
- 8.2.10 To respect the guidance on use of social media in relation to your role provided in the Trust's Social Media Policy. The Trust has a clear expectation that if a volunteer identifies an association with the Trust, discusses their work and/or colleagues, or comes into contact, or is likely to, with service users on any social media sites, he/she will behave appropriately and in a way which is consistent with the Trust's values. The duty to act in a manner that is in line with this policy does not only apply when a volunteer is carrying out his/her role, but at all times when a connection to the Trust has been made.

Volunteers are ultimately responsible for their own online behaviour. Volunteers must take care to avoid online content or actions that are inaccurate, libellous, defamatory, harassing, threatening or may otherwise be illegal. It is possible for volunteers to be subject to civil proceedings or criminal prosecution, in addition to any disciplinary action that may be taken;

**** The reimbursement rate for travel is linked to Public Transport Rate/Reserve Rate under Agenda for Change (AfC). This is reviewed every 6 months in line with the "AA General Guide to car running costs" and can increase or decrease accordingly. The 28p rate is effective from 1st November 2014.***

- 8.2.11 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);
- 8.2.12 On completion of voluntary work with the Trust you remain bound by confidentiality and must not disclose any information or matter to which you have had access to or have become aware of during your time as a volunteer. (Should this happen the Trust reserves the right to take any action necessary as it considers appropriate in the circumstances);
- 8.2.13 To enjoy the whole volunteering experience.

8.3 *Dealing with complaints or grievances*

- 8.3.1 The Trust aims to reflect the voluntary nature of its relationship with volunteers in its policies and procedures for managing volunteer involvement. The volunteer's Key Worker will deal with minor complaints or grievances about or by volunteers or their work through the usual support and supervision procedures in the first instance. If resolution is not possible the relevant Volunteer Coordinator will be contacted for advice and/or support.
- 8.3.2 However recognising its duty to protect the wellbeing and interests of all its stakeholders, where potential conduct issues arise these will be dealt with in line with the principles of the Trust's Disciplinary Procedure.
- 8.3.3 While the Trust accepts liability for volunteers whilst undertaking their approved duties please note that where loss or damage arises as a result of the volunteer's 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.

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 Community Development Strategy and Framework 2018
 - ❖ Department for Social Development, Join in Get Involved, Build a Better Future 2012
 - ❖ Regional Plan for Volunteering in Health and Social Care 2016-2018
 - ❖ Making Life Better 2013 - 2023 DHSSPS
 - ❖ Delivering Together - Health and Wellbeing 2020

Other relevant Trust policies include:

- ❖ Procedure regarding transport / driving duties
- ❖ Interim Guidelines for Reimbursement of Service Users, Carers and other stakeholders*
- ❖ PPI Framework 2018
- ❖ Quality Improvement Strategy 2017/18 – 2020/21
- ❖ Corporate Plan – Improving Together -2017/18– 2020/21

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 legislation and reflect organisational development.
- 10.2 This policy will be reviewed by the Assistant Director Promoting Well Being 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 in Appendices
- 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:

| | | |
|---|---|---|
| Promoting Well Being Team Brownlow H&SS Centre Craigavon BT65 5BE Tel: 028 37563949 | Promoting Well Being Team St Luke's Hospital Site Armagh BT61 7NQ Tel: 028 37564498 | Promoting Well Being Team John Mitchel Place Newry BT34 2BU Tel: 028 37566295 |
|---|---|---|

13.4 The Head of Service responsible for volunteering is:

Promoting Wellbeing Department
Ward 1, St Luke's Hospital
71 Loughgall Road
Armagh
BT61 7NQ

E:

Tel: 028 3756 4469

APPENDICES

APPENDIX 1

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 5) for every volunteering opportunity is completed. This should include a clear description of the roles/tasks/responsibilities/skills and qualities required to carry out 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 off with HSC Trade Unions
- 3 **Stage 2 – Application**
 - 3.1 Volunteer Coordinator meets with volunteer (either in person or virtually) to discuss the process and volunteering opportunities available. At this stage the volunteer is given an application pack.
 - 3.2 Volunteer completes the Application Pack (Application form, Access NI on-line application, Equality Monitoring form, consent form, and declaration of health forms)
 - 3.3 Two references are requested (Appendix 8). 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 dependant on the role being carried out. 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 Any relevant information will be shared on a ‘need to know’ basis, and 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 which 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 9)

7.1 The Volunteer Coordinator should set up a meeting between volunteer and key worker. The Volunteer Coordinator will accompany the volunteer to meet with the key worker. 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, references and training, the volunteer can only be informed of a start date after the checks have come back and training completed 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 for which they have not been properly trained.

10 Stage 9 - Volunteering Induction and Placement Induction

- 10.1 A Volunteer Agreement (Appendix 10) should be issued. An initial trial period is highlighted e.g. six weeks 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 18).

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 19).
- 12.2 Thereafter the Volunteer Coordinator will review placements on an annual basis (Appendix 21). 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 5)

- 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 6)

- 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 7).

3 REFERENCES (Appendix 8)

- 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 by completing an on-line Access NI form.

5 MEETING THE VOLUNTEER

- 5.1 Volunteers will be invited to a meeting with the key worker and the Volunteer Coordinator. 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 All information relating to volunteer recruitment will be processed in accordance with the Data Protection Act and Human Rights Legislation.

- 5.3 A volunteer cannot commence their placement until two acceptable references, occupational health approval and Access NI check outcome (if relevant) have been received and relevant training completed.

6 VOLUNTEER AGREEMENT (Appendix 10)

- 6.1 Volunteers must receive a volunteer agreement on commencing their volunteering or shortly thereafter.
- 6.2 Copies of the Volunteer Agreement will be forwarded to the volunteer 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 18), which must be completed by the key worker along with the Volunteer Co-ordinator. 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 14

10 VOLUNTEER RECORD

A personal file is maintained for all volunteers, which includes details of application, copy of photographic ID, agreements made, records of support and supervision activities, training undertaken and any complaints or grievances made or received.

Some of this information and other relevant information may also be recorded in computerised records. All such information is treated in accordance with the Data Protection Act 2018.

11 CONDUCT

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

- ❖ Breach of confidentiality
- ❖ Gross misconduct

11.2 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.

11.3 The decision to end a voluntary role will be taken by key worker in liaison with the Volunteer and Volunteer Co-ordinator and/or Human Resources Department if required.

12 TRAINING OPPORTUNITIES

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

| AWARENESS INFORMATION & TRAINING | STATUS |
|--|---------------|
| Health and Safety | Compulsory |
| Organisational Structures of the Facility | Compulsory |
| Data Protection and Confidentiality | Compulsory |
| Roles and Responsibilities of Volunteers | Compulsory |
| Manual Handling | As required |
| Use of equipment | As required |
| Fire procedures | Compulsory |
| Infection Prevention & Control | Compulsory |
| Food Hygiene | As required |
| Management of potentially violent and aggressive incidents | As required |
| Lone Worker | As required |
| Social Networking | Compulsory |
| Safeguarding Adults and Children | Compulsory |
| Risk Management | As required |

- 12.2 The volunteer should not be asked to undertake any role for which they have not received specific training.

13 SUPPORT AND SUPERVISION

- 13.1 As part of the volunteer's induction programme (Appendix 17), the volunteer will be introduced to their key worker who will be responsible for their supervision.
- 13.2 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.
- 13.3 The Volunteer Coordinator will review all volunteer placements annually.

14 EXPENSES

- 14.1 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.”

- 14.2 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.
- 14.3 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.
- 14.4 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.
- 14.5 Travel

❖ Reimbursement for travel is currently offered at 28p* per mile or on production of a valid bus or community transport receipt. 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

* The reimbursement rate for travel is linked to Public Transport Rate/Reserve Rate under Agenda for Change (AfC). This is reviewed every 6 months in line with the “AA General

Guide to car running costs” and can increase or decrease accordingly. The 28p rate is effective from 1st November 2014.

14.6 Subsistence (meals, e.g.)

- ❖ 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.
- ❖ 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

14.7 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. e.g. Volunteer Polo shirt (all volunteers), Volunteer Fleece (Here to Help, Promoting Wellbeing Hub), apron (Meal Time Support)

14.8 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.

- 14.9 Full details of the Volunteer Expenses guidelines are outlined at Appendix 22
- 14.10 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 23)
- 14.11 Please note that volunteer expenses shall be taken from the budget of the facility/department who requested the volunteer.

15 LIABILITY

- 15.1 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.

16 CONCERNS

- 16.1 If a concern arises an attempt to resolve it should be made informally at a local level involving the volunteer, key worker and Volunteer Coordinator.
- 16.2 If the problem cannot be resolved locally, the volunteer or key worker should approach the Volunteer Coordinator. The Volunteer Coordinator will organise a meeting with the key worker and the volunteer to seek to resolve the problem.
- 16.3 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 as a companion. 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.
- 16.4 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 24)
- 16.5 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.

17 EVALUATION OF VOLUNTEER INVOLVEMENT WITHIN THE TRUST

- 17.1 The Volunteer Coordinator will monitor recruitment, selection and ending of volunteer roles within the Trust.
- 17.2 It is the responsibility of key workers within the Trust to provide the necessary documentation for commencement and ending to the Volunteer Coordinator and to provide the relevant information needed to evaluate volunteer services. The volunteer co-ordinator shall complete an annual volunteer review.

18 CONTACT DETAILS

The Volunteer Coordinators can be contacted at:

Promoting Well Being Team - Craigavon

Brownlow Health Centre

1 Legahory Centre

Craigavon

BT65 5BE

Tel: 028 37563950

volunteer.service@southerntrust.hscni.net

Promoting Well Being Team - Armagh

St. Luke's Hospital Site

71 Loughgall Road,

Armagh

BT61 7NQ

Tel: 028 37564498

volunteer.service@southerntrust.hscni.net

Promoting Well Being Team - Newry

John Mitchel Place

Newry

BT34 2BU

Tel: 028 37566295

volunteer.service@southerntrust.hscni.net

The Head of Service for Volunteering can be contacted at:

Promoting Wellbeing Department

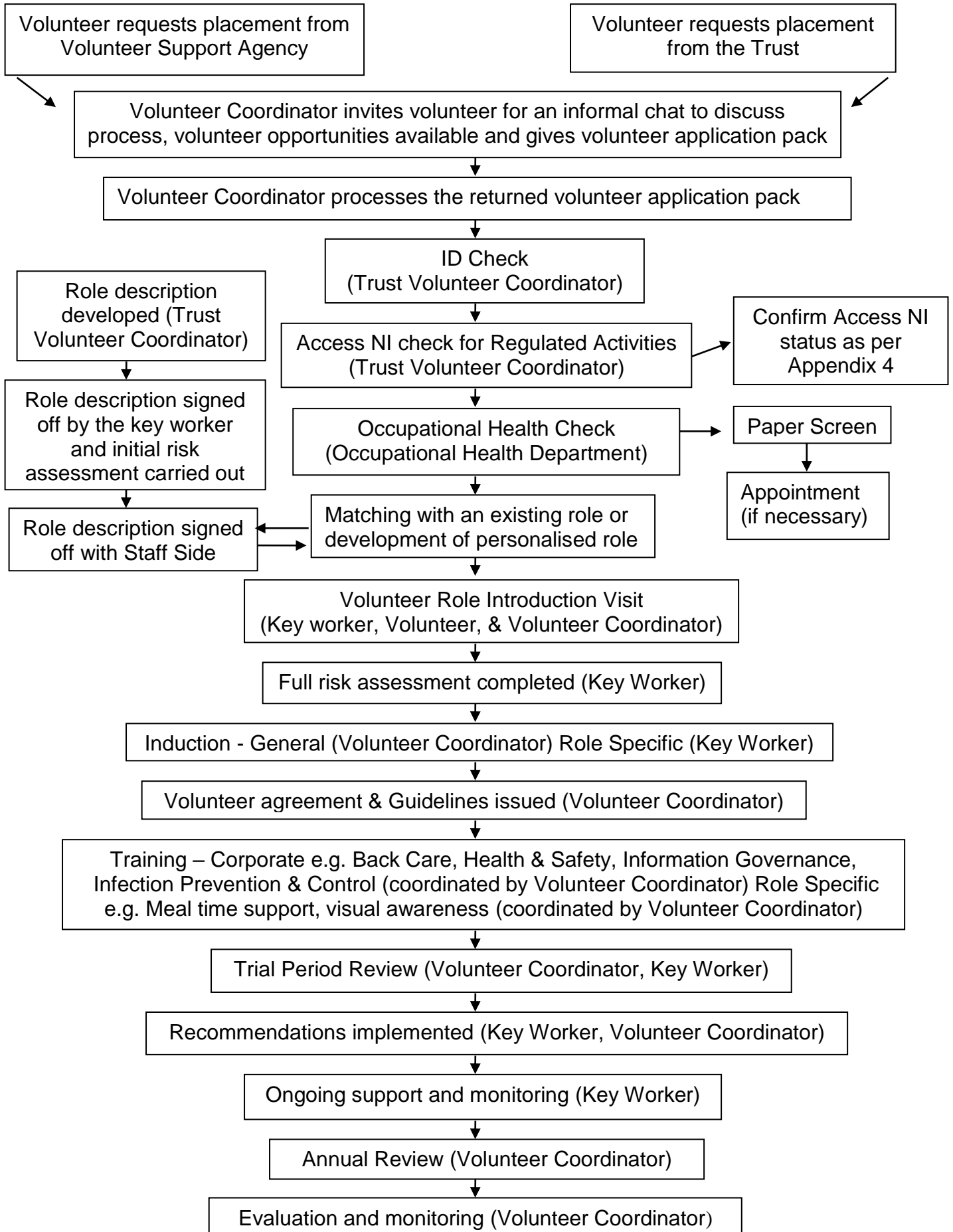
Ward 1 St Luke's Hospital

71 Loughgall Road, Armagh, BT61 7NQ

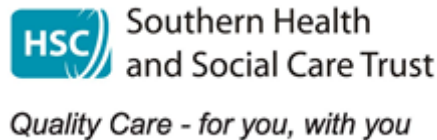
Tel: 028 37564469

E:

RECRUITMENT FLOWCHART



Verification of Access NI Status of Volunteers



Verification of Access NI Status of Volunteers

Dear <Name>

As the volunteer is not carrying out regulated activities within their volunteer role, I wish to confirm that a disclosure has not been sought for the following volunteer(s) through Access NI.

Name(s):

.....

.....

Regards

Volunteer Coordinator

Or

Verification of Access NI Status of Volunteers

Dear <Name>

As the volunteer is carrying out regulated activities within their volunteer role, I can confirm the following volunteer(s) has / have been subject to a Disclosure check through Access NI.

Name(s):

.....

The outcome of the vetting procedure is:

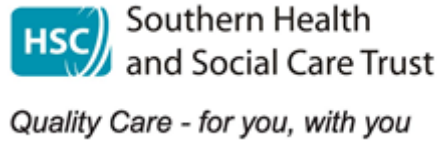
Satisfactory _____

Unsatisfactory _____

Regards

Volunteer Coordinator

VOLUNTEER ROLE DESCRIPTION



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. Is your management structure aware of this potential volunteer role?

2. Management Structure: _____

3. Volunteer’s area of responsibility:

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

5. Please outline how this role differs from that of a paid member of staff and why a volunteer is required.

6. Please specify on what days and for how many hours a week the volunteer would be required for?

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

8. 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.

9. How often would this supervision be carried out?

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

11. Bearing in mind the nature of the volunteering role available, is there a minimum age for a volunteer?

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

13. Do you consider the activities within this volunteer role to be regulated activities? Please explain with reference to the guidance attached.

14. Does the volunteer need their own transport?

Key Worker'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.?
- Vetting requirements - The definitions of Regulated Activity changed on 10 September 2012. In accordance with Government guidance, activities are considered regulated where the following services are provided:
 - ◆ Health Care
 - ◆ Personal Care
 - ◆ Social Work
 - ◆ Assistance with general household matters
 - ◆ Assistance with person's own affairs
 - ◆ Conveyancing
 - ◆ Further information and guidance is available at [Safeguarding Vulnerable Groups - Disclosure and Barring Service | Department of Health \(health-ni.gov.uk\)](http://www.health-ni.gov.uk/sgv)

VOLUNTEER APPLICATION FORM



Quality Care - for you, with you

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: _____

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.

| |
|--|
| |
| |
| |
| |
| |

Please indicate when you are available to volunteer

| | Mon | Tues | Wed | Thurs | Fri | Sat | Sun |
|-----------|-----|------|-----|-------|-----|-----|-----|
| Morning | | | | | | | |
| Afternoon | | | | | | | |
| Evening | | | | | | | |

Please tick which of the following areas of voluntary work you are interested in.

| | | | |
|-----------------------|--|-----------------------|--|
| Hospital Setting | | Entertainment | |
| Mental Health | | Driving | |
| Learning Disability | | Befriending | |
| Physical Disability | | Summer Scheme | |
| Sensory impaired/Loss | | Arts & crafts | |
| Older People | | Therapeutic Gardening | |
| Children | | | |

References: Please name 2 persons (not a family member and who is known to you for at least 2 years) 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.

| | |
|-------------|-------------|
| Name: | Name: |
| Address: | Address: |
| Post Code: | Post Code: |
| Telephone: | Telephone: |
| Occupation: | Occupation: |
| Email: | Email: |

DISABILITY

The Disability Discrimination Act 1995 defines disability as a physical or mental impairment which has a substantial and long term effect on a person's ability to carry out normal day to day activities. Normal day to day activities are outlined in the Act as those activities which affect one of the following broad categories of capacity; mobility; manual dexterity; physical co-ordination; continence; ability to lift, carry or otherwise move everyday objects; speech, hearing or eyesight; memory or ability to concentrate, learn or understand; or perception of risk of physical danger.

If you have a disability in line with this definition and require reasonable adjustment for the voluntary work you wish to be considered for, the Trust/Organisation would be keen to discuss this with you to agree what can be accommodated. Having read this definition do you require a reasonable adjustment for reasons related to a disability to allow you to undertake voluntary work? **Yes / No***

If you have answered yes to the above question on disability, a meeting will be arranged with you to discuss the reasonable adjustments required. To inform this discussion please provide details below of the reasonable adjustments required so that this may be fully considered.

Do you have a driving licence?
Yes / No

Do you have access to a car?
Yes / No

CRIMINAL RECORD

The HSC is committed to equality of opportunity for all volunteers, including those with criminal convictions. Whilst the disclosure of information does not automatically debar an individual from volunteering, it is essential that all convictions are disclosed to allow the Trust/Organisation to adequately consider their relevance to the volunteer role in question. We will undertake to ensure an open, measured and recorded discussion on the subject of any offences and other matters that might be considered relevant for the volunteer role concerned. The HSC considers failure by individual's to declare complete and accurate information about convictions to be a serious breach of trust.

Below you are asked to disclose any criminal convictions or offences. The role to which you have applied falls within the definition of 'excepted employment' as provided by the **Rehabilitation of Offenders (Exceptions) (NI) Order 1979** which provides additional protection to vulnerable groups and applies to all posts within the Health and Social Care Services. Under this Order, no conviction is ever regarded as spent. The only exception to this is protected disclosures as detailed in the Protection of Freedoms Act 2012.

Therefore you **MUST** disclose information about ALL cautions and convictions, even where they are ordinarily considered as "spent" (other than protected disclosures). You should also include any pending charges. **For motoring offences see next section.** In this regard please answer the following questions.

| | Yes | No |
|--|-----|----|
| Have you ever been convicted, charged, prosecuted, cautioned or bound over for any offence, no matter how minor? | | |
| Are you currently the subject of a police investigation or do you have any prosecutions pending? | | |

*If you have answered yes to any of the above questions, please provide details below. It is important that you list ALL charges, prosecutions, convictions, cautions, bind-over orders (other than protected disclosures) – **even if they happened a long time ago.***

| Date of conviction/charge/ Prosecution/caution/bind over | Offence | Penalty/Sentence received |
|--|---------|---------------------------|
| | | |

OTHER OFFENCES

Here you should state offences which are not criminal offences but must be declared to ensure the Trust/Organisation has full information of any offences you have, or have been charged with. For example minor motoring offences which you have not attended court over such as fixed penalty notices should be listed below.

| Date of Offence | Offence | Penalty received |
|-----------------|---------|------------------|
| | | |

SAFEGUARDING VULNERABLE GROUPS (NI) ORDER 2007 AS AMENDED BY THE PROTECTION OF FREEDOMS BILL 2012

Under the Safeguarding Vulnerable Groups (NI) Order 2007 as amended by the Protection of Freedoms Bill, the Trust/Organisation must not involve a volunteer in regulated activity who is barred from such activity.

| | Yes | No |
|---|------------|-----------|
| Are you currently barred from Regulated Activity by the Disclosure & Barring Service? | | |
| Are you currently referred for investigation to the Disclosure & Barring Service? | | |

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

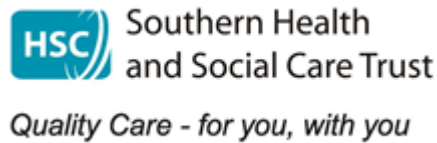
Signed _____ Date _____

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.

| | |
|---|--------------------------|
| <u>Official Use Only</u> | |
| ID Check carried out | <input type="checkbox"/> |
| Preferred volunteer opportunities: | |
| 1. | _____ |
| 2. | _____ |
| 3. | _____ |
| O.H. information forwarded to OH Dept. | Date |
| _____ | _____ |
| References Sent | Date _____ |
| Confirmed Volunteer Placement _____ | |

TRUST EQUALITY MONITORING FORM



EQUALITY MONITORING FORM

STRICTLY PRIVATE AND CONFIDENTIAL

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 co-operation 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
- 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 <input type="checkbox"/> | Black African <input type="checkbox"/> |
| Bangladeshi <input type="checkbox"/> | Pakistani <input type="checkbox"/> |
| Black Caribbean <input type="checkbox"/> | Irish Traveller <input type="checkbox"/> |
| Chinese <input type="checkbox"/> | Indian <input type="checkbox"/> |
| Filipino <input type="checkbox"/> | Mixed Ethnic Group <input type="checkbox"/> |
| Black Other <input type="checkbox"/> | |

Any other Ethnic Group (please specify) _____

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

Please specify: _____

8. POLITICAL OPINION

- Broadly Unionist
- Broadly Nationalist
- Other
- I do not wish to answer

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

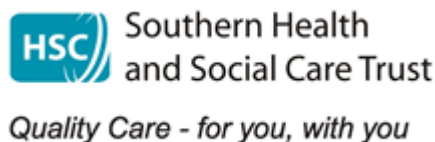
11. SEXUAL ORIENTATION

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.

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: _____

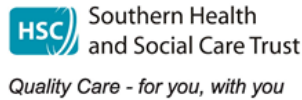
Signature: _____

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. What area of volunteering are you interested in, e.g. hospital setting, day centre, working with older people/young people?

3. Have you any skills and/or personal qualities that you would like to use in the course of your voluntary work? e.g.

| | |
|-----------------|--|
| Arts and Crafts | |
| Music | |
| Sports | |
| I.T. | |
| Other | |

| | |
|-------------|--|
| Honest | |
| Team Player | |
| Caring | |
| Other | |

3a. What skills would you like to develop?

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

5. We ask of a commitment of one year from volunteers; are you able to make this commitment?

Yes

No

Interviewed by: _____ Date: _____

Volunteer signature: _____ Date: _____

VOLUNTEER AGREEMENT



SOUTHERN HEALTH AND SOCIAL CARE TRUST

Date:

Dear

I would like to confirm that the Southern Health and Social Care Trust has completed your registration and is pleased to formally welcome you as a volunteer.

The Trust is committed to involving volunteers and supports the view that there is a very valuable and purposeful role for volunteers. 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.

The Trust has developed a Volunteer Policy and Procedures 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. This and other information on volunteering can be accessed on the Trust's website <https://southerntrust.hscni.net/involving-you/volunteering/>

As previously discussed, please find enclosed a copy of your volunteer agreement, role description and guidelines for volunteers and key workers for your records.

If you are happy with the terms of the Volunteer Agreement outlined in Appendix 1, please complete the reply slip at Appendix 2 and return to me in the addressed envelope provided.

I look forward to your reply and hope that you enjoy your volunteering experience with us and find it is of benefit.

Yours sincerely

Volunteer Coordinator

CONFIDENTIAL
VOLUNTEER AGREEMENT

VOLUNTEER PLACEMENT TERMS

Initial placement

Volunteer role: _____

Facility: _____

Team/Department: _____

Directorate: _____

Key Worker

The Key Worker retains overall responsible for your voluntary placement and will be your main contact during your volunteer placement.

You Key Worker will be: _____

Contact telephone number: (028) _____

Email:

Trial period

You will start on _____ with a six week trial period.

This will consist of an onsite induction programme and any other training deemed necessary for your volunteer role.

Your Key Worker and the Volunteer Coordinator will review your volunteer role after the trial period.

Length of volunteer placement:

As agreed at the interview, you will volunteer for approximately _____ per week. This arrangement may only be changed after discussion with your Key Worker.

If you cannot attend your placement, or have any particular concerns or problems, please contact your Key Worker in the first instance.

Role description

Enclosed with this Agreement is a copy of your role description, outlining the nature and purpose of your voluntary role. You have agreed to only undertake those tasks detailed, unless prior agreement is given through your Key Worker.

Guidelines for volunteers

The Guidelines for Volunteers with the Trust is also enclosed and they explain the Trust's procedure 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.

Indemnity

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.

Protective clothing and expenses

The Trust will provide all necessary protective clothing, and agreed expenses.

Support for your volunteer role

We will give you as much support as possible. We will carry out regular reviews to ensure that your support needs are identified and addressed in a timely manner. 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

Training 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.

It is mandatory that you complete your training before you commence your volunteering role. All procedures and details listed in this letter are outlined in full at the training.

Disclosure of criminal record

The sole purpose for requesting information about your criminal record is to offer protection to our clients and service users. Any disclosure will be considered 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.

It is therefore your duty to inform your Volunteer Coordinator of any updates which include: charges, prosecutions, convictions, cautions, bind over orders subsequent to taking up your volunteer role.

Data Protection Act 2018

The Southern Health and Social Care Trust is committed to the Data Protection Principles as laid out in the Data Protection Act 2018 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 your 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 2018 and/or
2. The Common Law Duty of Confidentiality
3. The Human Rights Act 1998

Records Management

Volunteers are required to adhere to the Trust Information Governance, Records Management and IT Policies and Procedures. Volunteers must only access information that is required to carry out their role, and only with approval from their key worker.

- 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.

Failure to adhere to any of the terms of the agreement may result in termination of the placement.

Volunteer Agreement Acceptance

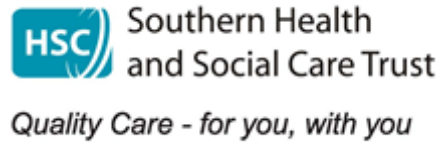
I confirm that I have read, understood and agree to the the conditions set out in my Volunteer and Confidentiality Agreement.

Name: _____

Address: _____

Placement: _____

Signed: _____



VOLUNTEER CONSENT FORM

I do / do not give permission for my photograph to be used in the Southern Trust literature e.g. Annual report for Volunteering, photo loop at Volunteer Recognition events, internal e-briefs to Trust staff, Trust face book page and newspaper publications. (Please delete as appropriate)

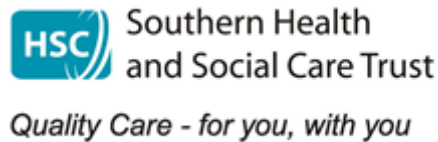
Not consenting, in no way affects your volunteering opportunity.

Print Name: _____

Signed: _____

Date: _____

You have the right to withdraw consent at any time but there will be limitations of being able to remove any images that have been published on the internet by newspapers or on social media.

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.

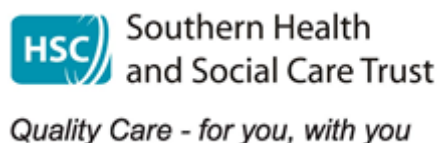
Please note that should a volunteering role involve having substantial access to children and /or vulnerable adults, a criminal record check has to be carried out by the police before any volunteering can commence.

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

*Please delete as appropriate

Signature: _____ Date: _____

GUIDELINES FOR VOLUNTEERS AND KEY WORKERS



Southern Health and Social Care Trust

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. Safeguarding Adults and Children Training and also training specific to roles, e.g Meal Time Support Training. 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 for whatever reason you should tell your named contact as soon as possible. Please do not attend your volunteering role if you feel unwell.
- 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 patients and clients in the course of your volunteer role with the Trust both while volunteering and thereafter. 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 volunteer role, you should check first with your key worker or with the Volunteer Coordinator.
- 3.8 Volunteers must be aware their responsibilities under the Data Protection Act 2018 and the duty of confidentiality they owe to patients and clients. Volunteers are also responsible for adhering to the Trust's policy on Information Governance. You should not seek medical or social information from the client / patient unless asked to do so by your key worker. 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.
- 3.9 **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.
- 3.10 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.
- 3.11 **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.
- 3.12 **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 Coordinator. The Volunteer Coordinator 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 Coordinator 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 ARISES 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 Volunteer Coordinator 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 Coordinator who will organise a meeting with yourself and the Local Manager / Key Worker to seek to resolve the problem.

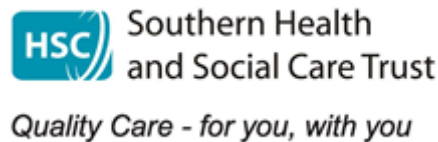
- 5.3 If the problem cannot be resolved at this level, then the Volunteer Coordinator will approach the Human Resources Department to convene a meeting which they will chair, which will seek to resolve the problem. You will be invited to attend this meeting with the Volunteer Coordinator, the Key Worker. 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 and 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 which 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 15

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 16
- ◆ 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/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 hours, 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

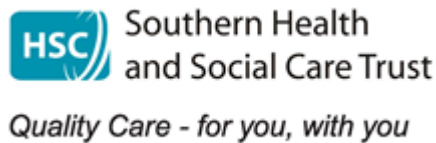
- 4.1 The Promoting Well Being Division is responsible for the development of policies relating to volunteering.
- 4.2 The Volunteer Coordinator will ensure the recruitment and selection of volunteer drivers is in line with the Trusts Volunteer Policy and Recruitment and Selection Procedure.
- 4.3 The 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 and Guidelines
- 4.8 The key worker/transport services department will be responsible for the continual support and supervision of the Volunteer Driver
- 4.9 Trust policies relating to volunteering will be included in 'Guidance for Key Workers'
- 4.10 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.

Template Letter to confirm requirements for Volunteers who transport service user/s in the course of their volunteer activity



Transport Services
Rosedale (1st Floor)
Bannvale House
10 Moyallen Road
Gilford
BT63 5JX

DATE

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:

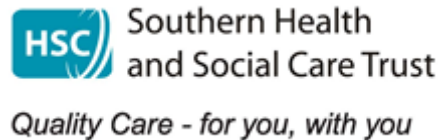
1. Copy of vehicle insurance
2. Copy of vehicle test certificate (if appropriate)
3. Copy of tax disc
4. Copy of Driver's Licence details (including any criminal or motoring convictions in the past 5 years.)

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 DATE. Thank you.

Yours faithfully
Head of Transport Services

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 Craigavon Area Hospital or Daisy Hill Hospital 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.



Volunteer Service

Key Worker Guidelines

Introduction

The Southern Health & Social Care Trust ('the Trust') is committed to involving volunteers to enhance the quality of care or services it provides and 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. 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.

Volunteer Policy and Procedures

The Trust has developed a Volunteer Policy and Procedures 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.

As a Key Worker you should therefore familiarise yourself with the Trust Volunteer Policy and Procedures which are available on the Trust's intranet and website.

The Trust Volunteer Service

The Trust's Volunteer Service is managed within the Promoting Wellbeing Division of the OPPC Directorate and operates across all programmes of care. There is a **Trust Volunteer Coordinator** based in each locality area who is responsible for: recruiting and vetting volunteers, developing volunteer roles, reviewing, monitoring and evaluating the volunteer service and **providing advice to Key Workers and volunteers**

| | |
|---|---|
| <p style="text-align: center;">Craigavon & Banbridge C&B Promoting Well Being Team Brownlow H&SS Centre Craigavon BT65 5BE Tel: 028 37563950</p> <p style="text-align: center;">Volunteer.service@southerntrust.hscni.net</p> | <p style="text-align: center;">Armagh & Dunagannon A&D Promoting Well Being Team St Luke's Hospital Site Armagh BT61 7NQ Tel: 028 3856 4498</p> <p style="text-align: center;">Volunteer.service@southerntrust.hscni.net</p> |
| <p style="text-align: center;">Newry & MourneN&M Promoting Well Being Team John Mitchel Place Newry BT34 2BU Tel: 028 3756 6295</p> <p style="text-align: center;">Volunteer.service@southerntrust.hscni.net</p> | |

The Role and Responsibilities of a Key Worker

The Trust has a duty of care in relation to its staff and volunteers. In order to ensure that a volunteer is supported in their role the Trust provides each volunteer with access to a key worker that the volunteer can contact for support and/or advice.

As the **Key Worker** for the volunteer/s in your department **you** are responsible for:

- ❖ Completing a risk assessment before a volunteer commences their role
- ❖ Providing a local induction for the volunteer outlining scope of role, supervision etc
- ❖ Providing regular supervision and ongoing support to the volunteer, and
- ❖ Informing the Volunteer Coordinator of changes or issues affecting the volunteer
- ❖ Informing the Volunteer co-ordinator of any concerns you have about the volunteers health or wellbeing
- ❖ Complete quarterly review form and return to volunteer co-ordinator

Risk assessment

In line with the Volunteer Policy and Procedures a risk assessment must be completed by the Key Worker to:

- ❖ Reduce risks to clients and the volunteer
- ❖ Ensure that volunteers are properly managed / supervised to work within their role outline and
- ❖ Ensure that volunteers are not involved in tasks that they have not been properly trained for, or
- ❖ Identify training needs for those undertaking the volunteer role
- ❖ A risk assessment should consider
- ❖ Volunteer role description
- ❖ Abilities and experience of the volunteer
- ❖ Client group
- ❖ Level of support and supervision

Inducting the volunteer

In line with the Volunteer Policy and Procedures a local induction must be completed by the Key Worker that will include:

- ❖ Specific information on the volunteer role
- ❖ Specific information on the facility including health and safety
- ❖ Appropriate guidelines for the volunteer role
- ❖ Agreement on Trial period
- ❖ Information on how to claim out of pocket expenses
- ❖ Training requirements

Supporting and supervising volunteers

- ❖ Regular supervision
- ❖ Ensure volunteer understands role- clear, concise tasks/ clear boundaries
- ❖ Ensure volunteer adheres to Trust policies and procedures- *What Trust expects from volunteer* (see below)
- ❖ Check if volunteer has any issues or concerns - *What volunteer can expect from Trust*
- ❖ Changes or issues communicated to Volunteer Coordinator as appropriate;
- ❖ Recognise and value the volunteer e.g. Thank you cards, Excellence Awards nomination etc.
- ❖ Ensuring the Volunteer Coordinator is informed of any concerns you may have about the volunteer's suitability to their role.

What the Trust expects from its volunteers

- ❖ To do their volunteering reliably and with commitment;
- ❖ To arrive at their role on time and fit to carry out their role. If unable to attend for any reason contact their key worker in the first instance as soon as possible;
- ❖ To always act on and within the advice of the key worker;
- ❖ To volunteer in a way which corresponds to the aims and values within the Southern Health and Social Care Trust;
- ❖ To be honest - if any problems should arise, talk to their key worker or Volunteer Co-ordinator;
- ❖ To attend training and support sessions if these are an agreed part of the voluntary placement;
- ❖ To respect confidentiality;
- ❖ To highlight any issues that may contribute to the delivery of better services or a better patient/service user experience;
- ❖ To inform key worker and 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);
- ❖ 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);
- ❖ To enjoy the whole volunteering experience.

What a volunteer can expect from the Trust:

- ❖ To receive a suitable induction outlining scope of role, supervision etc.
- ❖ Access to a key worker that the volunteer can contact for support and/or advice
- ❖ Specific information on the volunteer role
- ❖ Guidelines on how the volunteer should carry out his/her role
- ❖ A trial period to see if the role is suitable and to resolve any problems that may arise
- ❖ Regular support and supervision
- ❖ 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
- ❖ Reimbursement of out of pocket expenses
- ❖ Appropriate indemnity arrangements through a volunteer agreement
- ❖ Training to help the volunteer fulfil their volunteering role
- ❖ Safe and healthy volunteering
- ❖ Respect for diversity where people are treated fairly and equitably
- ❖ The opportunity to withdraw from their voluntary role, if he/she is not satisfied with it
- ❖ Clearly defined roles of a Trust Volunteer Coordinator and key staff in volunteer support agencies in each locality
- ❖ Assurance that volunteer roles are not job substitutions



Quarterly Review of the Volunteer Activity

Quarter ending: _____

Key Worker Name: _____ Ward _____

How many volunteers are currently on your ward?

Do they sign in and out each week? Yes No

Have you sent a copy of sign in sheets to the Volunteer Co-ordinator?

Yes No

How many quarterly reviews have you completed with the volunteers?

Have you any issues or concerns around the volunteers or the meal time support role?

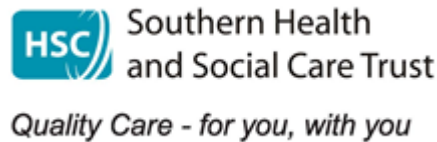
Thank you for completing.

Kind regards

Volunteer Coordinator
Promoting Wellbeing Team

Tel:

INDUCTION PROGRAMME



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.

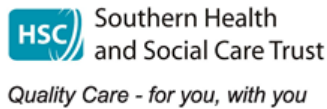
The key worker is responsible for ensuring that the volunteer has received an adequate induction for the volunteering role.

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

6-week review date:

Duplicate copy:



Original:

INDUCTION CHECKLIST

Volunteers Name: _____

Facility/Department: _____

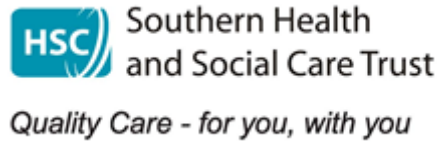
Start Date: _____

Volunteer Hours: _____

| | To be explained /carried out by | Date and initial when completed |
|---|---|---------------------------------|
| <p>1. Initial reception</p> <ul style="list-style-type: none"> ◆ Welcome volunteer and introduce them to staff ◆ Confirm the Key Worker ◆ Explain Parking ◆ Have you completed the Trust Volunteer Corporate Induction Training? ◆ Date attended ◆ | <p><i>Volunteer Coordinator</i></p> <div style="border: 1px solid black; width: 30px; height: 20px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; width: 130px; height: 20px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; width: 60px; height: 20px;"></div> | |
| <p>2. The building</p> <ul style="list-style-type: none"> ◆ Tour of premises ◆ Toilets, cloakroom ◆ Health & Safety rules - Emergency exits and Evacuation procedures ◆ Ward protocol | <p><i>Key Worker</i></p> | |
| <p>3. Facility Rules</p> <ul style="list-style-type: none"> ◆ Smoking ◆ Use of telephone for personal use ◆ Use of mobile phones ◆ Security arrangements in relation to storage of personal property | <p><i>Volunteer Coordinator / Key Worker</i></p> | |
| <p>4. Role of the Volunteer</p> <ul style="list-style-type: none"> ◆ Volunteer's area of responsibility ◆ Days/hours that volunteer will volunteer ◆ Importance of reliability ◆ Trial period ◆ System for reporting back ◆ Practical help and suggestions ◆ Important to let the key worker know in the first instance if you are unable to attend | <p><i>Volunteer Coordinator & Key Worker</i></p> | |

| | | |
|--|--|--|
| <p>5 Volunteer's support system</p> <ul style="list-style-type: none"> ◆ Who will supervise the volunteer? ◆ Where and when you can contact this person? ◆ Support available ◆ Supervision meetings ◆ Training available ◆ Expenses – mileage & subsistence | <p><i>Volunteer Coordinator & Key Worker</i></p> | |
| <p>6. Health and Safety</p> <p>Risk assessment carried out and volunteer informed of control measures in place for their safety</p> <ul style="list-style-type: none"> ◆ First Aid facilities (community based facilities) ◆ Local First Aider (community based facilities) ◆ Refer to CD for policies regarding safe systems while volunteering <p>Prior to Induction training</p> <ul style="list-style-type: none"> ➤ Explain safety procedure while on ward or in community facility | <p><i>Volunteer Coordinator & Key Worker</i></p> | |
| <p>7. Other Information</p> <ul style="list-style-type: none"> ◆ Confidentiality ◆ Infection prevention & control measures e.g. sickness ◆ Any further information that is deemed necessary in order for the volunteer to successfully fulfil their volunteer role | <p><i>Volunteer Coordinator & Key Worker</i></p> | |
| <p>8. Volunteer received</p> <ul style="list-style-type: none"> ◆ Uniform Yes/No ◆ ID Badge Yes/No | <p><i>Volunteer</i></p> | |
| <p>9. Six week Review</p> <ul style="list-style-type: none"> ➤ Complete trial period review <ul style="list-style-type: none"> • Assess all aspects relating to the volunteers performance • Ensure the volunteer is clear on their role and responsibilities • Ensure Key Worker is clear on their role and responsibilities | <p><i>Volunteer Coordinator</i></p> | |

VOLUNTEER REVIEW



Trial Period Review

Name of Volunteer: _____

Role: _____

Key Worker: _____

Date: _____

1. Following your induction into your placement dated _____; did you receive:

- | | |
|------------------------|----------|
| a) Volunteer agreement | Yes / No |
| b) Role description | Yes / No |
| c) Polo shirt | Yes / No |
| d) I.D. badge | Yes / No |

2. Do you know the emergency procedures of your placement;

- | | |
|--------------------|----------|
| a) Fire / accident | Yes / No |
| b) Emergency exits | Yes / No |

3. Are you comfortable with the tasks you have been given in your role?

Yes / No

4. Are there any areas that you feel you lack the skills or experience needed to fulfil your volunteer role effectively?

Yes / No

5. Do you think there is any training that you could take that would assist you in volunteering role?

Yes / No

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

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

8. Key Worker follow up feedback received Yes / No?

Date: _____

Comments: _____

Next review date: _____

Signatures

Key Worker: _____

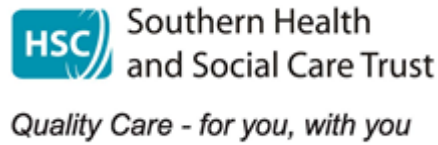
Volunteer: _____

3. Next steps

Signatures

Key Worker: _____

Volunteer: _____



Annual Volunteer Review

Name of Volunteer: _____

Role: _____

Date: _____

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

2. 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?

7. Are you happy to continue in this role, or would you like to explore other volunteering opportunities?

Yes No

Comments:

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?

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 28p* 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

*** The reimbursement rate for travel is linked to Public Transport Rate/Reserve Rate under Agenda for Change (AfC). This is reviewed every 6 months in line with the “AA General Guide to car running costs” and can increase or decrease accordingly. The 28p rate is effective from 1st November 2014.**

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:
 - Bodily injury or death of third parties
 - Bodily injury or death of any passenger and
 - 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 15.

Subsistence

- 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
- 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

- 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
- Volunteers should submit receipts for entry fees when accompanying clients (e.g. to swimming pool, social or recreational activity). Prior approval will be necessary
- 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

- 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.

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 25.

- ❖ 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 25) 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.

VOLUNTEER TIME SHEET AND EXPENSES CLAIM FORM



Quality Care - for you, with you

Volunteer Time Sheet and Expenses Claim Form

| Date | Volunteer Hours | Training Hours | Particulars of Journeys | Type of transport used | Total miles | Public transport cost (please attach receipts) | Other | For office use only Miles @ rate | For office use TOTAL £ |
|------|-----------------|----------------|-------------------------|------------------------|-------------|--|-------|----------------------------------|------------------------|
| | | | | | | | | | |
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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



Quality Care - for you, with you

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.

| | |
|--|--|
| Name of volunteer | |
| Date of ending volunteering role (if applicable) | |
| Date of changing volunteering role (if applicable) | |
| New volunteering role & placement location | |

| |
|-------------------------------|
| Reason for termination/change |
|-------------------------------|

| |
|---|
| What did you enjoy most about you volunteer role? |
|---|

| |
|--|
| What did you enjoy least about you 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 Coordinator