



Public – To be published on the Trust external website

Title: Volunteer (General) Procedure

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1 Introduction

Volunteers are an important part of our workforce. The Trust recognises that volunteers provide many benefits which help our services, support staff and improve patient and carers experiences. The “We are the NHS: People Plan” recognises the importance of volunteers as part of the NHS workforce.

People volunteer for many reasons including:

- To give something back/contributing to our communities
- To explore a career in healthcare
- To meet new people and make new friends
- To develop or maintain skills and experience
- To help develop or improve specific services
- To maintain or improve their health and wellbeing
- As part of their care/recovery pathway

Volunteers complement the work we do and can help us to achieve Our Journey to Change. This procedure has been developed with this in mind.

The benefits of having volunteers within the Trust include:

- Supporting staff so that they can prioritise clinical care
- Providing an extra pair of hand and eyes to support patients
- Bringing unique skills, ideas, and innovation to services
- Building a bridge between mental health and learning disability services and the community
- Providing a pipeline of talent towards employment within the Trust

Volunteering roles have been developed and tailored to support the Trust to provide compassionate and inclusive care.

Volunteering roles include:

- Ward based activity/befriending volunteers
- Volunteer drivers
- Patient/carer feedback volunteers
- Chaplaincy volunteers
- Check and chat volunteers
- Administration volunteers
- Meeting & greeting volunteers

The roles that volunteers perform are complementary to and supportive of the work undertaken by paid staff – they do not replace roles that should be undertaken by paid employees.

It is important to recognise that volunteers do not have employment rights: the law views them as it does any other member of the public. However, they are part of the team when they volunteer alongside us and will be treated with and expected to live by the same values of compassion, respect and responsibly. This means that teams should stay in touch with their volunteers and provide regular communication to ensure they feel part of the organisation.

2 Purpose

Following this procedure will help the Trust to:

- Recruit, support and manage volunteers appropriately and consistently
- Understand the function of the Voluntary Services Department
- Provide a framework in which volunteers can contribute safely and effectively
- Ensure that the Trust offers support and recognition to volunteers for the valuable time, skills and commitment that they offer
- Recognise that the status of volunteers differs to that of paid staff and requires a distinct management framework that combines a supportive atmosphere with effective governance arrangements.

3 Who this procedure applies to

This procedure applies to volunteers and staff. It covers general volunteering roles in the Trust, which are roles that enhance our services and improve the experience of patients and carers.

3.1 Who this procedure does not apply to

This procedure does not apply to:

- Medical placements
- Researchers on voluntary arrangements or honorary contracts
- Involvement and Engagement Team participation
- People who are studying NVQ's and need a placement for this purpose
- Work experience placements.
- Student placements.
- Trust Governor activities

3.2 Trust Values

To ensure this procedure aligns to the Trust Values, the views of registered volunteers and staff have been sought and included.

Our strategic goals as outlined in the Trust Strategic Framework 2021 – 2025 are

To co-create a great experience for our patients, carers and families, so you will experience:

- **Outstanding** and compassionate care, all of the time.
- **Access** to the care that is right for you.
- **Support** to achieve your goals.
- **Choice** and control.

To co-create a great experience for our colleagues, so you will be:

- **Proud**, because your work is meaningful.
- **Involved** in decisions that affect you.
- **Well led** and managed.
- That your workplace is **fit for purpose**.

To be a great partner, so we will:

- Have a **shared understanding** of the needs and the strengths of our communities
- Be **working innovatively** across organisational boundaries to improve services.
- Be **widely recognised** for what we have achieved together.

The Trust's Journey To Change Launched in 2021 outlines the Trust's new set of Values

The Trust is committed to co-creating safe and personalised care that improves the lives of people by involving them as equal partners. The most important way we will get there is by living our values, all of the time.



Respect

- Listening
- Inclusive
- Working in partnership



Compassion

- Kind
- Supportive
- Recognising and Celebrating



Responsibility

- Honest
- Learning
- Ambitious

4 Related documents

This procedure also refers to:-

- ✓ [Human Rights, Equality and Diversity Policy](#)
- ✓ [Information Governance Policy](#)
- ✓ [Confidentiality and sharing information policy](#)
- ✓ [Disclosure and Barring Service \(DBS\) Procedure](#)
- ✓ [Health & Safety Policy](#)
- ✓ [Dress Code Procedure](#)
- ✓ [Lone working procedure](#)

5 Volunteer Recruitment and Selection

The Voluntary Services Department (VSD) will oversee the recruitment of volunteers, this includes:

- Advertising for volunteer positions
- Shortlisting and interviewing
- Recruitment checks – DBS, Occupational Health, and references
- Volunteer inductions and training

5.1 Requesting volunteers

Services will contact the VSD when they wish to request volunteers.

For new volunteering opportunities the VSD will work with the service to develop a robust role description for the volunteer, in order to ensure that the role is appropriate for a volunteer to undertake (Appendix 3 – example of volunteer role description).

The VSD will develop a recruitment plan with the service which may include some of the following:

- Advertising on NHS Jobs
- Advertising on TEWV's social media pages
- Advertising in local universities/colleges
- Advertising in volunteering bureaus
- Advertising in local community services
- Promoting to existing volunteers

5.2 Fast track volunteers

Occasionally services will want to offer a particular person a volunteering role due to the person's specific skills or experience, without advertising the role. In this case services should contact the VSD to develop a role description.

The VSD will contact the potential volunteer to undertake all the recruitment checks.

5.3 Volunteer recruitment process

Volunteers must be over 18 to undertake volunteering onto a clinical area.

Volunteers will be interviewed by the VSD and, where possible, staff from the service requesting the volunteer. Interviews may be face to face, over the telephone, or on Microsoft Teams, and the interviews may be individual or group interviews depending upon the role and the service they will be volunteering in.

If a volunteer is not successful the VSD will contact the person and explain the reasons why, and where possible discuss other volunteering opportunities.

The VSD will carry out recruitment checks, all volunteers will need to provide two references and relevant ID to confirm their identity. All volunteers will be required to have occupational health clearance for their role(s). If any workplace adjustments are required, the VSD will work with the service to ensure they are in place to enable the volunteer to undertake their role.

DBS checks will be carried out in accordance with the Trust's Disclosure and Barring Service procedure. Eligibility to undertake a DBS check will be determined at the recruitment stage, based on the requirements of the role as outlined within the role description, and mandated guidance available from the DBS and NHS Employers Employment Standards; [DBS guide to eligibility - GOV.UK](#) or [Criminal record check - NHS Employers](#).

The VSD will work with the service to establish the level of DBS appropriate for each volunteering role. There is no cost to the volunteer for the DBS check.

The DBS Update Service allows applicants to have their DBS certificate kept up to date and take it with them from role to role within the same workforce. The VSD will actively encourage the volunteer to sign up to this service. With prior permission, the VSD will undertake a free instant online certificate check annually to see if any new information has come to light since issue.

Should someone have a positive DBS check, a risk assessment will be undertaken by the Service Manager, HR Operations Manager and the VSD; with appropriate advice from the Trust Safeguarding team. The following issues should be taken into consideration; this list is not exhaustive.

- The seriousness of the offence
- Time frame for when the offences were committed and has there been any recognised training programme completed by the applicant in respect of the offences.
- Are the offences related to Drug and Alcohol misuse, mental ill health?

The volunteer will have the opportunity to discuss the information as part of the Risk Assessment process. The decision to deploy a volunteer will be dependent upon the outcome of Risk Assessment.

6 Equality and Diversity

Volunteering offers opportunities and it is essential that roles are open to all sections of the community and any advertising and recruiting procedures are consistent with our Human Rights, Equality and Diversity Policy.

Reasonable adjustments will be made to assist volunteers to register and undertake their role e.g. large print application forms, forms on different coloured paper, access to interpreters, adjustments to the interview process or the way training is delivered.

If a volunteer is unable to undertake their volunteering activity due to a change in health or pregnancy alternative volunteering opportunities will be explored in conjunction with the volunteer for a temporary or permanent basis. Volunteers can also request to go on hold from their role for a period.

7 Induction and Training

7.1 Volunteer Induction and ongoing support

Volunteers will be offered the opportunity to attend Trust induction and will receive a Local Induction in the chosen area by an identified member of staff.

The inductions will include:

- Orientation of the ward/service
- Health and safety (including fire safety awareness and Infection Prevention Control)
- Introductions to team
- Professional boundaries
- Information Governance
- Lone working

All volunteers will receive support from the VSD during their volunteering. In some areas more intensive support will be offered which could include a member of the VSD supporting a volunteer on a ward during the initial visits.

All volunteers will be given a volunteer handbook and specific volunteer role guidance.

All volunteers will be required to sign a role description which includes an agreement to follow information Governance and confidentiality procedures.

Each volunteer will be assigned a named supervisor within the service where they will volunteer who, will be a contact and provide day to day supervision for the volunteer.

Depending on the nature of the volunteer role and the supervisory needs of the volunteer, the nature of the supervisory relationship may range from day-to-day oversight of the work, along with availability of the supervisor for advice, to formal supervision. This will be discussed and arranged at induction.

The VSD will undertake regular reviews with volunteers this will include discussions about the current placement and personal/career/training development goals, to ensure volunteers have the opportunity to develop and progress.

7.2 Volunteer training

Volunteer mandatory training will be completed via The National Learning Hub for Volunteers. Training must be completed within three months of volunteers starting their volunteering roles.

The following mandatory training topics are essential for Volunteers:

- Roles and Responsibilities of a Volunteer
- Conflict Resolution for Volunteers
- Data Security Awareness for Volunteers (refresher yearly)
- Communication for Volunteers
- Equality, Diversity and Human Rights (refresher every 3 years)
- Safeguarding Adults & Children for Volunteers (refresher every 3 years)
- Mental Health, Learning Disability & Dementia Awareness for Volunteers
- Fire Safety for Volunteers (refresher yearly)
- Health and Safety for Volunteers including Infection Prevention Control (refresher every 3 years)

Volunteers will be required to undertake training updates on an annual or three yearly basis.

The VSD will send reminders to volunteers when they are due training updates and monitor completion.

If a volunteer requires any adjustment or additional support to complete the volunteer training the VSD will provide assistance.

The Trust will accept the National Volunteering Certificate as evidence that volunteers have completed relevant volunteering training. In this case volunteers would only need to complete annual/ three yearly training updates, starting from the certificate date of issue.

If a volunteer's role requires them to have an NHS mail account and access to the Trust's IT system, they will also complete Network Training.

8 Health and Safety

The Trust is committed to providing a safe and healthy environment for all employees, service users, carers, visitors, and volunteers, in line with Health and Safety legislation and the Trust's Policy.

It is the responsibility of volunteers to take reasonable care for the health and safety of themselves and others. Hazards or hazardous situations should be reported immediately to a member of staff.

If an incident occurs whilst carrying out voluntary duties, the volunteer should notify a senior member of staff in the area where they are carrying out their duties immediately. The senior member of staff will ensure the incident is recorded on the Datix system.

Procedures for reporting health and safety concerns will be explained at induction and detailed in the Volunteer Handbook.

9 Insurance

Registered Trust Volunteers will be covered by the Trust, Employer Liability and Public Liability Insurance.

Volunteer drivers will need to ensure that their motor insurance covers them for volunteering activity.

10 Security

The VSM will hold a record of the names and addresses of all registered volunteers for purposes of security and health & safety.

All registered volunteers conducting in person roles will be issued with a lanyard and name badge, including a photograph. Volunteers must wear this at all times to aid recognition by staff, patients and visitors.

Volunteers will follow the Lone Working Procedures that are in place within the service where they volunteer, if appropriate.

11 Dress Code

Volunteers are required to follow the Trust's Dress Code Procedure.

12 Smoking Policy

Volunteers are required to follow the Trust's Nicotine Management Policy. Volunteers are not permitted to smoke in any part of the Trust's premises or grounds.

13 Volunteer Drivers

Any volunteer who offers their services as a volunteer driver must provide the following original documents, their current driving licence, motor insurance and, and where applicable, MOT certificate, on commencement of driving duties and annually thereafter. VSD will remind drivers when their documents are due for annual review. All volunteer drivers should also familiarise themselves with the Volunteer Driving Guidance.

All volunteer drivers must inform their insurance company of this use of their vehicle and provide the VSD with confirmation that their voluntary activity is included in their motor policy.

Volunteer drivers are eligible for reimbursement of expenses incurred through use of their car in the service of the Trust. Reimbursement will be at an agreed mileage rate applicable to Trust volunteers.

The Volunteer driver is also responsible for immediately updating the VSD should their driving status change or the status of their vehicle has changed.

Services must ensure a risk assessment has been completed for any patient transport volunteering task along with a management plan. Any appropriate information must be shared with the volunteer driver. Any patient that is considered a risk would not be considered suitable for volunteer patient transport.

Services must use the patient transport flowchart (Appendix 4) to ensure that only those who are eligible access this service.

14 Therapy Pet Volunteers

Therapy pets visiting Trust sites must be registered with a visiting animal assisted intervention organisation e.g. Pets As Therapy and will be accompanied by their owner who will be registered as a Trust volunteer or will be registered as a volunteer from another organisation (see section 16). The volunteer will need to provide evidence that they are registered with a recognised and reputable organisation, this will ensure that the pet has undertaken an assessment on their temperament, they have the relevant vaccines and that the volunteer has had specific training.

The service will be responsible for completing a risk assessment considering any allergies, phobias, and Infection Prevention Control considerations.

15 Out of Pocket Expenses

Trust volunteers are entitled to reimbursement of travelling expenses incurred travelling to and from home and the Trust in their capacity as volunteers. Claims for home to Trust mileage will only usually be paid for journeys up to 20 miles but claims for higher mileages may be agreed between the VSD and Service Manager in exceptional circumstances. This may either be the direct cost of public transport by producing bus tickets or, if a private vehicle is used, the agreed mileage rate applicable to Trust volunteers. Appropriate expense forms can be obtained from the VSD.

Volunteers will be entitled to a meal (up to the value of £3.00) if they provide more than 4 consecutive hours commitment to the Trust in any one day. Volunteers must submit receipts and claim this using an expenses form.

Volunteers claiming benefits should seek advice from the Department of Working Pensions about receiving expenses and all aspects of volunteering as it can affect availability to seek work.

16 Volunteers from Other Organisations

If a volunteer is assured by another reputable organisation (e.g. students volunteering via a university) the Trust will accept the organisation's DBS and reference checks but will still need these volunteers to be registered with TEWV to cover them under the Trust insurance policy. Organisations must complete the checklist in Appendix 5, this must be sent to the VSD so the volunteer can be registered.

If an individual is undertaking a volunteer role as a member of a support organisation such as MIND, the support organisation will need to provide the assurance and insurance. Volunteers who are not registered with the Trust's VSD will not be insured and must provide their own alternative insurance protection to the same level as the Trust Policy.

17 Concerns and Complaints

All Trust volunteers will be encouraged to approach the VSD with feedback and/or concerns (Appendix 6, Volunteer Complaint Flowchart). All volunteers will receive information about the Trust's Freedom to Speak up Guardian and the Trusts raising concerns processes in the volunteer handbook.

17.1 Complaints about a volunteer

There may be occasions where a member of staff, another volunteer, service user or carer raises concerns about a volunteer's conduct or their capacity to adhere to the agreed boundaries of their role.

In the first instance attempts should be made to resolve issues sensitively through informal discussion.

If concerns cannot be resolved informally the staff member should contact the Voluntary Services Manager who will investigate the complaint and will gather information from all parties concerned (see Appendix 7).

17.2 Suspension of a volunteer

Occasionally it will be necessary to suspend a volunteer with immediate effect while an investigation is carried out. Generally, but not exclusively, this would be because they have committed an act such as theft, assault, an act of violence, malicious damage, fraud, harassment or being under the influence of drugs or alcohol.

The decision to suspend a volunteer will need to be confirmed in writing to the volunteer and, in some instances, legal proceedings may need to be concluded before the steps of the problem-solving procedure can take place, detailed in Appendix 7.

17.3 Withdrawal of a volunteer agreement

The VSD has the authority at any time to withdraw a volunteer for reasons of conduct or other organisational reasons. The volunteer will be informed of this and of the reasons for the decision during a face to face meeting with the Service Manager and a representative of the VSD. This meeting will be followed up by a letter, reiterating the reasons for the decision and outlining the volunteer's right of appeal as described in Appendix 7. On such termination volunteers will return their ID badge, lanyard and any other Trust property to the VSD.

18 Break from Volunteering

Volunteers may request to take a break from their volunteering role for many reasons including changes to their health or other commitments.

Volunteers can remain on hold for up to 6 months. If a volunteer wants to remain on hold for longer than this when they return to volunteering, they will need to complete refresher training and the VSD will check their DBS on the Update Service or undertake a new DBS. If applicable the volunteer may be required to undertake an Occupational Health check.

If there is no contact between a volunteer and the VSD in 12 months the volunteer will be removed from the volunteer register and will be required to undertake the volunteer recruitment process if they choose to return at a future date.

Volunteers wishing to return after a break cannot be guaranteed that the same role or place will be available.

19 Volunteer's Personal Information

The VSD is responsible for retaining accurate records for all Trust volunteers in relation to volunteer names and addresses, personal details, pre volunteer checks and details of all training undertaken to match their volunteering role, to be stored on a central database. Any personal information collected by the Trust from volunteers will comply with relevant General Data Protection Regulations

(GDPR) and legislation. A copy of the Volunteer Privacy Notice will be included in the Volunteer handbook.

20 Leaving a Volunteering Role

Volunteers leaving their volunteer role will be thanked personally wherever possible. All volunteers will be issued with a personalised thank you letter acknowledging their achievements. Volunteers will be sent an anonymous exit survey to gather feedback to inform and improve the VSD.

Volunteers will need to return any Trust property including their volunteer ID badge.

Volunteers may request character references for future employment, study or other voluntary roles provided they have consistently participated for a minimum of three months.

21 Definitions

| Term | Definition |
|----------------------------|--|
| VSD | Voluntary Services Department – The team who oversees volunteering activity within the Trust |
| Volunteer | An unpaid individual, fully registered and trained, participating in an activity with an agreed Role Description |
| DBS | Disclosure and Barring Service, a national screening process used to identify activity of a criminal nature |
| Volunteer Role Description | An outline of the duties of a role, lines of accountability, location, skills, knowledge and experience required and key working relationships |

22 How this procedure will be implemented

- This procedure will be published on the Trust’s intranet and external website.
- Line managers will disseminate this procedure to all Trust employees through a line management briefing.
- This procedure will be publicised in the volunteer handbook and during the volunteer induction

22.1 Training needs analysis

| Staff/Professional Group | Type of Training | Duration | Frequency of Training |
|--------------------------|------------------|----------|-----------------------|
| | | | |

| | | | |
|------------------------------|-------------------------|-----------|---|
| Volunteer Mandatory Training | Online training modules | 4 -10 hrs | Fire and Information Governance Training annual refreshers all other modules every three years. |
|------------------------------|-------------------------|-----------|---|

23 How the implementation of this procedure will be monitored

| Auditable Standard/Key Performance Indicators | | Frequency/Method/Person Responsible | Where results and any Associate Action Plan will be reported to, implemented and monitored; (this will usually be via the relevant Governance Group). |
|---|--|---|---|
| 1 | Volunteer recruitment files will be audited to confirm checks are in line with the procedure. These include DBS checks, two reference checks, signed role description, completed induction and completed training. | The Voluntary Services Manager will select 6 random files to audit monthly. | Compliance rates will be reported to the Workforce Senior Leadership Group on an annual basis |
| 2 | Active number of volunteers, number of volunteers starting and number of volunteers leaving | The Voluntary Services Manager will review every 6 months. | Data will be provided to the Workforce Senior Leadership Group on an annual basis |
| 3 | Volunteers demographics | The Voluntary Services Manager will review every 6 months. | Data will be provided to the Workforce Senior Leadership Group on an annual basis |
| 4 | Reasons why volunteers leave | The Voluntary Services Manager will review every 6 months. | Data will be provided to the Workforce Senior Leadership Group on an annual basis |

24 References

DBS Eligibility Guidance (2018), [DBS eligibility guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/db-eligibility-guidance)

Health Education England, National learning Hub for Volunteering (2022), [Volunteer Learning](#)

NHS Employers, NHS Employment Check Standards (2019), [Criminal record check | NHS Employers](#)

We Are The NHS: People Plan (2020), [We-Are-The-NHS-Action-For-All-Of-Us-FINAL-March-21.pdf \(england.nhs.uk\)](#)

25 Document control (external)

To be recorded on the policy register by Policy Coordinator

| | | |
|---|--|-------------|
| Date of approval: | 17 May 2022 | |
| Next review date: | 17 May 2025 | |
| This document replaces: | Volunteer (General) Procedure CORP-0059-001-v2 | |
| This document was approved by: | Name of committee/group | Date |
| | HR Policy Working Group | 13 May 2022 |
| | JCC | 17 May 2022 |
| This document was ratified by: | Name of committee/group | Date |
| | n/a | |
| An equality analysis was completed on this document on: | 15 th April 2022 | |
| Document type | Public | |
| FOI Clause (Private documents only) | n/a | |

Change record

| Version | Date | Amendment details | Status |
|---------|-------------|---|----------|
| 2.1 | 15 Apr 2022 | <p>Full review with changes clarifying existing practice:</p> <ul style="list-style-type: none"> • The training requirements for volunteers has changed this has been approved by the Workforce Senior Leadership Group (section 7.2) • Added section about Therapy Pet Volunteers (section 14) • Added section about how volunteer information is managed (section 19) • Added section about Volunteer Drivers (section 13) • Updated audit process (section 23) • Removed outdated appendices | Approved |

Appendix 1 - Equality Analysis Screening Form

Please note: [The Equality Analysis Policy and Equality Analysis Guidance can be found on the policy pages of the intranet](#)

| Section 1 | Scope |
|---|---|
| Name of service area/directorate/department | Voluntary Services Department |
| Title | Volunteer (General) Procedure |
| Type | Procedure/guidance |
| Geographical area covered | Trust wide |
| Aims and objectives | <p>Following this procedure will help the Trust to:</p> <ul style="list-style-type: none"> Recruit, support and manage volunteers appropriately and consistently Understand the function of the Voluntary Services Department Provide a framework in which volunteers can contribute safely and effectively Ensure that the Trust offers support and recognition to volunteers for the valuable time, skills and commitment that they offer Recognise that the status of volunteers differs to that of paid staff and requires a distinct management framework that combines a supportive atmosphere with effective governance arrangements. |
| Start date of Equality Analysis Screening | 1 st March 2022 |
| End date of Equality Analysis Screening | 15 th April 2022 |

| Section 2 | Impacts |
|---|---|
| Who does the Policy, Service, Function, Strategy, Code of practice, Guidance, Project or Business plan benefit? | All prospective and existing Trust volunteers, staff, service users and carers will benefit from the procedure. |

| | |
|--|---|
| <p>Will the Policy, Service, Function, Strategy, Code of practice, Guidance, Project or Business plan impact negatively on any of the protected characteristic groups?</p> | <ul style="list-style-type: none"> • Race (including Gypsy and Traveller) /NO • Disability (includes physical, learning, mental health, sensory and medical disabilities) NO • Sex (Men, women and gender neutral etc.) NO • Gender reassignment (Transgender and gender identity) NO • Sexual Orientation (Lesbian, Gay, Bisexual and Heterosexual etc.) NO • Age (includes, young people, older people – people of all ages) YES • Religion or Belief (includes faith groups, atheism and philosophical beliefs) NO • Pregnancy and Maternity (includes pregnancy, women who are breastfeeding and women on maternity leave) NO • Marriage and Civil Partnership (includes opposite and same sex couples who are married or civil partners) NO • Veterans (includes serving armed forces personnel, reservists, veterans and their families) NO |
| <p>Describe any negative impacts</p> | <p>People need to be over the age of 18 years old to volunteer in clinical areas of the Trust this could negatively impact on younger people who would like to volunteer. This will be included in a review to try and proportionately remove the negative impact; this will include identifying roles that would be suitable for younger people along with identifying those roles that would not be suitable due to risk.</p> |
| <p>Describe any positive impacts</p> | <p>The Trust seeks to recruit a diverse volunteering workforce and welcome applicant from people from protected characteristic groups and veterans. The procedure demonstrates that the Trust will actively try and remove any barriers to volunteering to ensure the opportunities are accessible for everyone.</p> |

| | |
|---|--|
| <p>Section 3</p> | <p>Research and involvement</p> |
| <p>What sources of information have you considered? (e.g. legislation, codes of practice,</p> | <p>Feedback from volunteers and staff. Advice from Legal team, EDHR team and Information Governance team</p> |

| | |
|--|---|
| best practice, nice guidelines, CQC reports or feedback etc.) | |
| Have you engaged or consulted with service users, carers, staff and other stakeholders including people from the protected groups? | YES |
| If you answered Yes above, describe the engagement and involvement that has taken place | A diverse range of volunteers including people from protected characteristic groups and who access our services have been involved in the development of this procedure. A wider consultation with the trust has been undertaken for a period of three weeks to support work already done with volunteers and with teams supporting volunteers. |
| If you answered No above, describe future plans that you may have to engage and involve people from different groups | |

| Section 4 | Training needs |
|--|-----------------------|
| As part of this equality analysis have any training needs/service needs been identified? | NO |
| Describe any training needs for Trust staff | none |
| Describe any training needs for patients | none |
| Describe any training needs for contractors or other outside agencies | none |

Check the information you have provided and ensure additional evidence can be provided if asked

**Please note; The Equality Analysis Policy and Equality Analysis Guidance can be found on the policy pages of the intranet
You must contact the EDHR team if you identify a negative impact - email tevw.eandd@nhs.net**

Appendix 2 – Approval checklist

To be completed by lead and attached to any document which guides practice when submitted to the appropriate committee/group for consideration and approval.

| | Title of document being reviewed: | Yes/No/ Not applicable | Comments |
|-----------|---|---------------------------|---|
| 1. | Title | | |
| | Is the title clear and unambiguous? | Yes | |
| | Is it clear whether the document is a guideline, policy, protocol or standard? | Yes | |
| 2. | Rationale | | |
| | Are reasons for development of the document stated? | Yes | |
| 3. | Development Process | | |
| | Are people involved in the development identified? | Yes | |
| | Has relevant expertise has been sought/used? | Yes | Legal team, EDHR team and Information Governance team |
| | Is there evidence of consultation with stakeholders and users? | Yes | |
| | Have any related documents or documents that are impacted by this change been identified and updated? | N/A | |
| 4. | Content | | |
| | Is the objective of the document clear? | Yes | |
| | Is the target population clear and unambiguous? | Yes | |
| | Are the intended outcomes described? | Yes | |
| | Are the statements clear and unambiguous? | Yes | |
| 5. | Evidence Base | | |
| | Is the type of evidence to support the document identified explicitly? | Yes | |
| | Are key references cited? | Yes | |
| | Are supporting documents referenced? | Yes | |
| 6. | Training | | |
| | Have training needs been considered? | Yes | |

| | Title of document being reviewed: | Yes/No/ Not applicable | Comments |
|------------|---|---------------------------|-------------------------|
| | Are training needs included in the document? | Yes | |
| 7. | Implementation and monitoring | | |
| | Does the document identify how it will be implemented and monitored? | Yes | |
| 8. | Equality analysis | | |
| | Has an equality analysis been completed for the document? | Yes | |
| | Have Equality and Diversity reviewed and approved the equality analysis? | Yes | |
| 9. | Approval | | |
| | Does the document identify which committee/group will approve it? | Yes | The Policy Review Group |
| 10. | Publication | | |
| | Has the document been reviewed for harm? | Yes | |
| | Does the document identify whether it is private or public? | Yes | |
| | If private, does the document identify which clause of the Freedom of Information Act 2000 applies? | N/A | |

Appendix 3 – Blank Volunteer Role Description

Volunteer Role Description – Tees Esk and Wear Valleys NHS Foundation Trust

Title:

Purpose

Expectations

Line Manager

Main point of contact/supervisor

Service Contact Details

E mail:

Telephone:

Hours

Role Summary

Provide details of the volunteering role

Role Limitations

- No access to PARIS (Patients electronic notes)
- No access to the contents of patient's paper notes
- You will not be asked to undertake clinical duties such as personal care, feeding patients, delivering therapy, administering medication

What will you gain from the role

- Training
- The opportunity to be a part of a multi-disciplinary team.
- Making a contribution to the wellbeing of service users their carers and families

Any other information

You will need to have a Disclosure and Barring Service (DBS) check and provide two independent references from people who have known you for more than two years (this cannot be a family member)

Volunteers must be aged 18 or older.

DATA SECURITY

Individuals who carry out activities on behalf of the Trust must keep data secure. The information you handle while volunteering may be personal information – information about people or it may be business information – information about the commercial activities of the organisation.

Information relating to patients, clients, staff, visitors and details of contract prices and terms is covered under the meaning of data. This includes information held on computers, computer printouts and manual (paper) records. Trust Volunteers are required to ensure that information about patients is safeguarded to maintain security and is kept securely in accordance with NHS requirements (specifically the National Data Guardian Standards for Health and Social Care).

Data security has three aspects and all are equally important: confidentiality, integrity and availability. You must handle information in the course of your volunteering in a way that will always maintain its confidentiality, integrity and availability.

Confidentiality can be described as the state of keeping or being kept secret or private.

Integrity is the trustworthiness and dependability of information. It is also about accuracy, consistency and reliability.

Availability is the quality of being able to be used or obtained.

Data protection legislation reinforces the contractual obligation of data security and regulates the use of all information relating to any living identifiable individual that the Trust may hold, regardless of the media in which it is held. This information may be as basic as name and address. Unauthorised disclosure of any of this information may be deemed a criminal offence. If you are found to have permitted the unauthorised disclosure of any such information, you and the Trust may face legal action. Information can only be shared using an appropriate legal basis. If you are not sure about the appropriateness of sharing personal information you must contact the Trust's Information Governance Team for advice.

You must not, whether during your volunteering with the Trust, or after the end of it, whether you leave or your volunteering role is terminated by the Trust, unless expressly authorised by the Chief Executive of the Trust, make any disclosure to any unauthorised person or use any confidential information relating to the business affairs of the Trust. This includes any detail about the clients and employees of the Trust, actual, potential or past and all details relating to information on any of the Trust's databases or paper-based records.

Data protection law mandates a duty for all organisations to report certain types of personal data breach to the Information Commissioner's Office. You must report all personal data breaches on the Trust's incident reporting system without delay. If you cannot do this you must contact the Trust's Information Security Team.

A personal data breach means a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data. This includes breaches that

are the result of both accidental and deliberate causes. It also means that a breach is more than just about losing personal data and can result in real harm to individuals.

A personal data breach can be broadly defined as a security incident that has affected the confidentiality, integrity or availability of personal data. There will be a personal data breach whenever any personal data is lost, destroyed, corrupted or disclosed; if someone accesses the data or passes it on without proper authorisation; or if the data is made unavailable, for example, when it has been encrypted by ransomware, or accidentally lost or destroyed.

Personal data breaches may lead to your volunteering role being terminated.

Unauthorised access, modification, transfer, disclosure or deletion of computer held records are criminal offences under the Computer Misuse Act 1990 and make the offender liable to a fine, or 5 years imprisonment or both. These offences constitute gross misconduct and may result in termination of your volunteering role in the organisation. Unauthorised access, modification, transfer, disclosure or deletion of manual or electronic records will attract similar sanctions.

Remember, personal information is protected by data protection law and it is your legal responsibility to help protect it.

Volunteer's Signature:

Date:

Appendix 4 – Patient Transport Flowchart

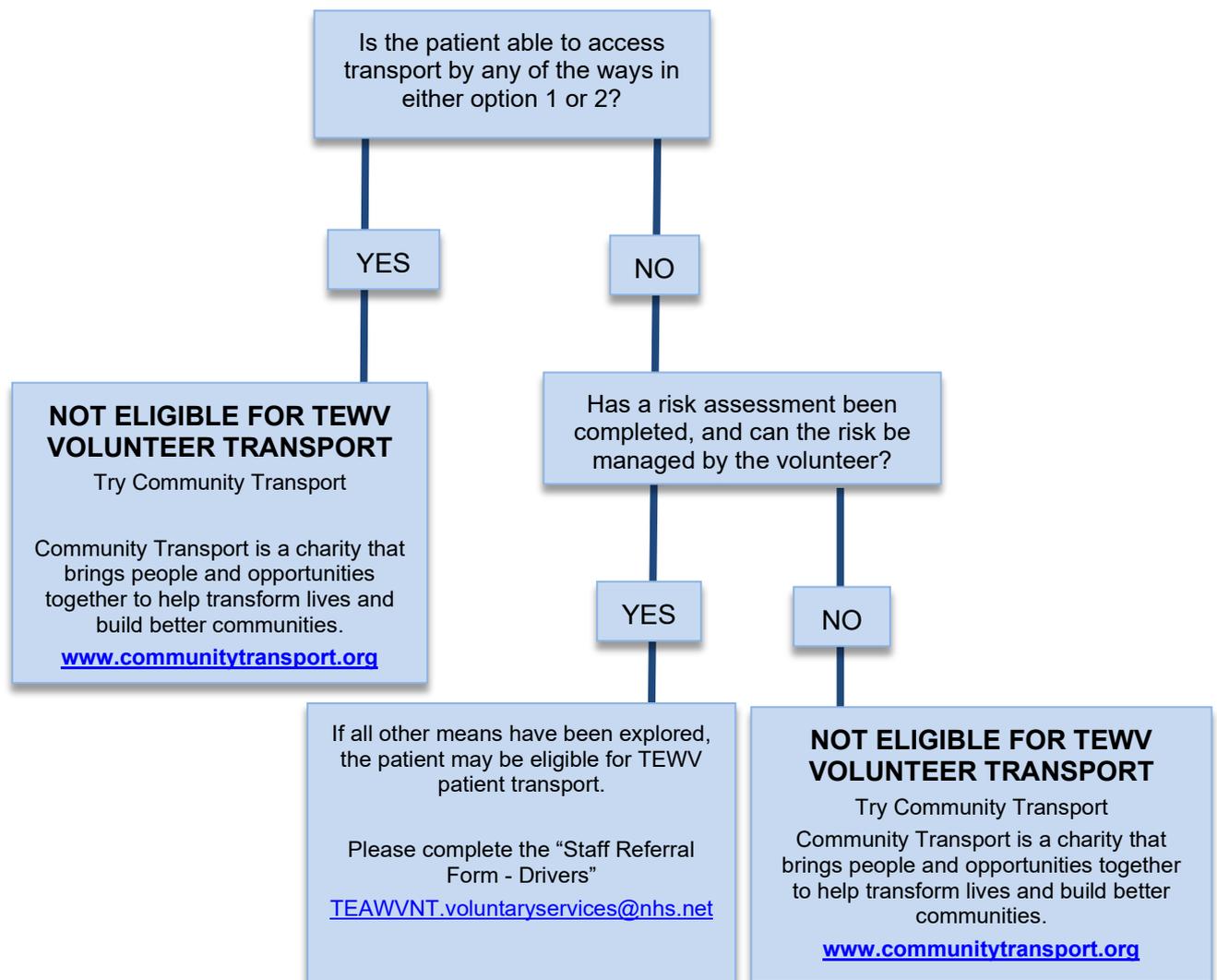
CRITERIA FOR VOLUNTARY SERVICES TRANSPORT SERVICE

This service is only available Monday - Friday 9am-5pm

The NHS expects patients to make their own way to and from outpatient appointments unless there is a clearly defined clinical reason why they cannot use:

1. Conventional transport such as walking, cycling, public transport including bus, train community transport schemes, voluntary transport schemes or a taxi.
2. Private transport including lifts by friends, carers, neighbours, relatives, or the patient's normal network of support.

IS YOUR PATIENT ELIGIBLE FOR VOLUNTARY SERVICES TRANSPORT



EXAMPLES OF PEOPLE ELIGIBLE FOR PATIENT TRANSPORT

- A patient is struggling with anxiety and is unable to get public transport or a taxi
- A patient who has dementia and may become confused using public transport or a taxi
- A patient needs additional support during transport e.g. due to trauma

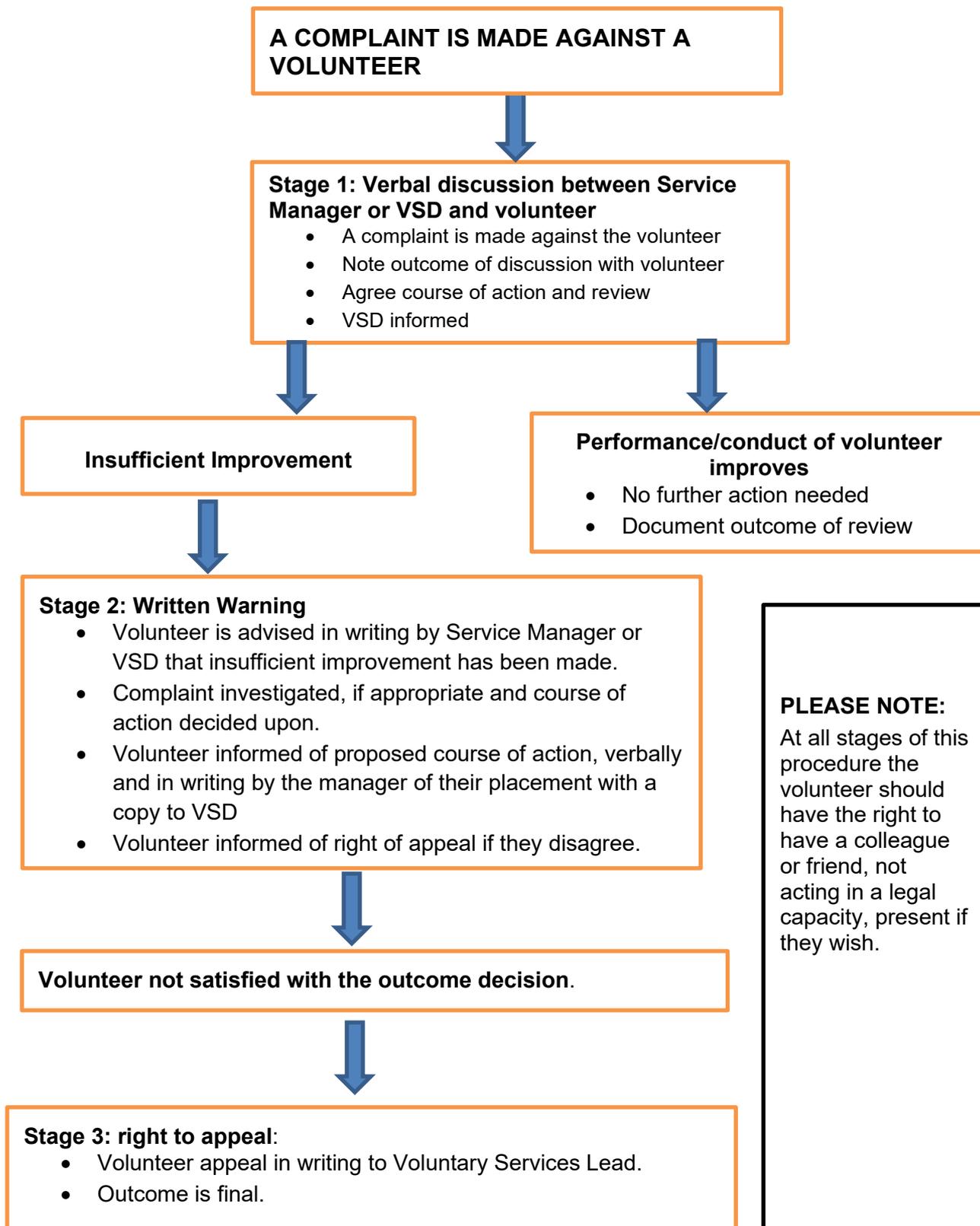
We have a limited number of volunteer drivers and therefore need to ensure that only those who are eligible access patient transport to ensure we can meet service needs

Appendix 5– Volunteers from Other Organisation Form

Verification of Volunteer Details by Other Organisations

| | |
|--|--|
| NAME OF VOLUNTEER: | |
| ADDRESS OF VOLUNTEER: | |
| DOB OF VOLUNTEER: | |
| EMAIL ADDRESS: | |
| CONTACT NUMBER: | |
| DATE COMMENCED VOLUNTEERING: | |
| SATISFACTORY DBS | YES / NO: _____ DATE: _____ Any additional information relevant to share: |
| CERTIFICATE DATE: CERTIFICATE DISCLOSURE NUMBER: LEVEL & TYPE WORKFORCE OF DBS: | |
| MEDICAL CLEARANCE: | YES / NO: _____ DATE: _____ Any additional information relevant to share: |
| 2 SATISFACTORY REFERENCES RECEIVED: | YES/NO: _____ DATE: _____ Any additional information relevant to share: |
| VOLUNTEERS SIGNATURE: | |
| ORGANISATION REPRESENTATIVE SIGNATURE: | DATE: _____ |
| ROLE: | |
| PRINT NAME: | |

Appendix 6 – Complaint Against a Volunteer Flowchart



Appendix 7 – Complaint from a Volunteer

