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Framework For Working with Volunteers & Volunteering Operational Procedure

Framework Statement

The Health Board recognises the important and valuable contribution of volunteering in enhancing the services provided by paid staff, ultimately improving the experience for patients. Volunteering is integral to patient experience and clearly aligned to the Patient Experience Framework.

The development of volunteering is very much a key part of the future strategic direction of Cardiff and Vale University Health Board. Therefore, explicitly stating the processes necessary within this Operational Procedure will safeguard our patients and also volunteers, and maintain exemplary governance within the organisation.

Framework Commitment

Voluntary Services will:

- Create clearly defined roles for volunteers to support patients in a variety of settings
- Develop clear recruitment, training and induction processes for volunteers
- Provide appropriate management, support and supervision for volunteers
- Provide a clear identity for volunteers as individuals and as a team that recognises the value of their contribution
- Develop improved volunteer pathways with Health Board services and the wider community including Third Sector Organisations

Supporting Procedures and Written Control Documents

This Framework and the supporting procedures describe the following with regard to:

- A Charter for Strengthening Relations between Paid Staff and Volunteers
- The Wellbeing of Future Generations Act
- Volunteering Policy Supporting Communities, Changing Lives
- A Healthier Wales – Our Plan for Health and Social Care
- Social Services and Well-being (Wales) Act 2014
- People Experience Framework
- Shaping Our Future Wellbeing
- Equality, Inclusion and Human Rights Policy
- All Wales Safeguarding Policy
- Recruitment and Selection Policy
- Disclosure and Barring Service Procedure

Scope

This Framework applies to all of our services, volunteers and staff in all locations.

<u>Equality & Health Impact Assessment (EHIA)</u>	
Part 1 – Equality and Health Impact Assessment (EHIA)	An Equality Impact Assessment (EHIA) has been completed and this found there to be a positive impact. Key actions have been identified and these can be found in <i>EHIA 2026-2029 Volunteer Framework</i> .
Approved by	Patient Experience Directorate Management Team and Staff Side
Group with authority to approve procedures written to explain how this policy will be implemented	
Accountable Executive or Clinical Board Director	Executive Nurse Director
Author	Assistant Director of Patient Experience
<u>Disclaimer</u> If the review date of this document has passed please ensure that the version you are using is the most up to date either by contacting the document author or the <u>Governance Directorate</u> .	

Summary of reviews/amendments			
Version Number	Date Review Approved	Date Published	Summary of Amendments
1			Volunteer Framework and Volunteering Operational Procedure 2020-2025
2	29/09/2026	07/10/2026	Updated volunteer Framework and Volunteering Operational Procedure to replace previous version.



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Cardiff and Vale University
Health Board Voluntary Services

CARDIFF AND VALE UNIVERSITY HEALTH BOARD

FRAMEWORK FOR WORKING WITH VOLUNTEERS

2026-2029

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What is a volunteer?

Volunteers are individuals who undertake activity on behalf of our organisation, unpaid and of their own free choice

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1.0 INTRODUCTION

Cardiff and Vale University Health Board recognises the important and valuable contribution of volunteering in enhancing the services provided by paid staff, ultimately improving the experience for patients. Volunteering is integral to patient experience and clearly aligned to the Patient Experience Framework.

The Volunteer Framework is also closely aligned to the Cardiff and Vale University Health Board Strategy “*Shaping Our Future Wellbeing Strategy*” 2023-2035.

This 2026-29 Framework builds on the success of the previous Frameworks providing the vision for the expansion of current volunteering opportunities and development of new schemes. There will be an annual report undertaken to monitor progress. The report will be subject to regular review in order to respond to any changes in strategic direction and environments of care.

Volunteers are people who commit time and energy for the benefit of others, doing so freely, through personal choice and without expectation of financial reward.

For those volunteering within the Health Board, we pledge to ensure the:

- Creation of clearly defined roles
- Development of a clear recruitment process
- Development of induction and ongoing training
- Provision of appropriate management, support and supervision
- Provision of a clear identity for volunteers as individuals and as a team that recognises the value of their contribution
- Development of further accessible opportunities for all
- Recognition of Volunteers through Annual Thank You Events.

Fundamentally, we enhance the patient experience by maximising the added value provided by volunteers through:

- The development of roles that support patients in a variety of settings
- Continuing and further developing existing volunteer support through a variety of mechanisms and projects
- Developing improved volunteer pathways with Health Board services and the wider community including Third Sector Organisations

This will ensure a supportive, responsive, effective service provision that is safe, sustainable and valuable for all.

2.0 LOCAL AND NATIONAL CONTEXT

Evidence consistently demonstrates the positive human, economic, social and cultural value that volunteering brings. Volunteering delivers benefits not only to organisations and the people they support, but also to wider society. Importantly, volunteering benefits individuals by strengthening social networks, improving health and wellbeing, developing skills and fostering a sense of belonging to a cause or community (Welsh Government, *Volunteering Policy: Supporting Communities, Changing Lives*, 2015).

This evidence aligns directly with the **All-Wales People Experience Framework**, which defines people's experience as *"the sum of all interactions, shaped by the culture of the organisation, staff and systems"*. Volunteering positively influences these interactions across clinical and non-clinical settings by enhancing how people feel when they access, move through and engage with Health Board services.

As a national policy foundation, *Supporting Communities, Changing Lives*, alongside the *Wales Council for Voluntary Action (WCVA) Code of Practice for Involving Volunteers*, recognises the significant contribution that volunteering makes to wellbeing at individual, local and national levels. This Framework is underpinned by this national guidance and aligns closely with Cardiff and Vale University Health Board's *Shaping Our Future Wellbeing Strategy 2015–2025* and the current organisational strategy *Living Well, Caring Well, Working Together (2023–2035)*. In doing so, it supports a culture that places people, relationships and wellbeing at the heart of service delivery.

The People Experience Framework recognises that **organisational culture and staff experience are intrinsically linked to people's experience**, and that quality is achieved through compassionate, inclusive and responsive interactions. Volunteering plays a key role in supporting this culture by complementing paid roles, strengthening community connection and enhancing the relational aspects of care that matter most to patients, carers and families.

Wellbeing is also central to two elements of the quadruple aim outlined in *A Healthier Wales* (2018):

- Improving population health and wellbeing
- Supporting a motivated and sustainable health and social care workforce

Volunteering contributes directly to both aims by supporting prevention, reducing social isolation and enhancing the experience of care, while also positively influencing staff and volunteer wellbeing. This reflects the People Experience Framework's emphasis on listening, learning and using experience feedback alongside other measures to drive improvement and quality.

The King's Fund (*Adding Value Through Volunteering in NHS Trusts*, 2022) recognises that individuals volunteer within healthcare and public service environments for a variety of reasons, including:

- Wanting to make a positive difference
- Giving time to a cause of personal importance

- Personal development, including learning, gaining insight and building skills
- Maintaining and developing social connections
- Exploring pathways that may lead to employment within the public service sector

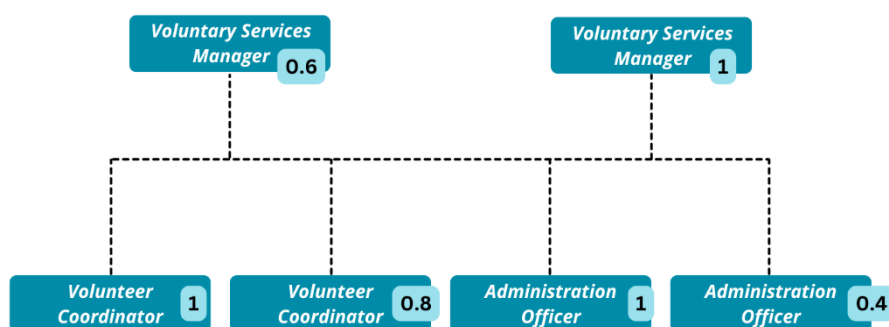
These motivations align closely with the People Experience Framework's focus on **person-centredness, inclusion and meaningful involvement**, recognising that positive experiences are shaped not only by outcomes, but by how people are treated, supported and valued throughout their interaction with services.

As a proactive volunteer organisation, this Framework sets out how Cardiff and Vale University Health Board will improve access to volunteering for all, ensuring opportunities are inclusive, equitable and reflective of the communities we serve. Volunteering is recognised as an integral component of people's experience, contributing to compassionate care, improved wellbeing and positive interactions across Health Board services. Building on existing Voluntary Services initiatives, this Framework supports a consistent, quality-driven approach to volunteering that aligns fully with the principles and expectations of the People Experience Framework.

2.1 Developments within the Team

At Cardiff and Vale University Health Board volunteering opportunities and provision is a key part of our corporate social responsibility.

To ensure sustainability and maintenance of delivery of services within the next three years Volunteer Services has, within the team, the following staff members:



Volunteering services across the Health Board currently provide high-quality support that adds value to the experience of patients, families, carers and staff. Volunteering activity contributes positively to compassionate, person-centred care and enhances the overall experience of people accessing Health Board services.

Volunteers themselves benefit in a number of ways, including improved mental and physical health and wellbeing, opportunities to develop skills and confidence, and, for some, a potential pathway into employment.

Volunteering activity is already established across multiple hospital and community sites, supporting services in a range of settings and reflecting the Health Board's commitment to accessible, inclusive and high-quality volunteering provision.

3.0 AIMS AND OBJECTIVES

The aims and objectives are to ensure:

3.1 Ongoing Recruitment and Retention of Volunteers

This is achieved by maintaining robust and accessible governance processes. Including clearly defined roles, recruitment processes through the volunteer Software Assemble, induction and ongoing appropriate support and supervision.

3.2 Future Role Development

It is important to continue expanding the range of roles and activities undertaken by volunteers, ensuring the service remains responsive and shaped by what patients, carers and staff tell us is needed. This will be achieved through the ongoing development and promotion of volunteering opportunities across a wide variety of care settings and population groups, particularly in areas where volunteering has not previously been a focus or where unmet need has been identified.

This includes broadening access to volunteering for individuals who may experience barriers to participation, those with additional support needs, and people who are currently under-represented within volunteering activity. A proactive and inclusive approach will ensure volunteering reflects the diverse communities served by the Health Board and supports equitable access to meaningful opportunities.

There will be a specific focus on increasing opportunities for young people through the development of youth-friendly volunteering initiatives. This includes existing youth-focused programmes and time-limited projects that align with the Health Board's strategic objectives and national youth engagement priorities, supporting participation, voice and personal development.

In addition, there is a recognised need to further develop volunteering opportunities that are flexible, accessible and responsive, enabling engagement in settings and activities that have not traditionally benefited from volunteer involvement, and ensuring volunteering continues to add value across the full breadth of Health Board services.

3.3 Team Engagement

To ensure a knowledgeable, confident and well-supported volunteering team, it is essential to work in partnership both within and beyond the Health Board. This includes collaborative engagement with Health Board staff at all levels, recognising their vital role in shaping, supporting and integrating volunteering activity within services.

A coordinated, all-Wales approach to volunteering will be supported through partnership working with other Health Boards, enabling the sharing of learning, good practice and innovation. This will include active participation in national forums and networks, such as the All-Wales NHS Volunteer Group, alongside proactive engagement with comparable, high-performing health organisations across the United Kingdom. Ongoing involvement in national and regional learning opportunities, including sector-led meetings, webinars, focused discussions and shared resources, will further support continuous improvement.

In addition, strong partnerships will continue to be developed with external organisations, including County Voluntary Councils, support groups and Third Sector organisations, to promote volunteering opportunities and widen access. These relationships will complement and strengthen existing collaborative links with local schools, colleges and universities, supporting progression, inclusion and community connection.

Through effective partnership working with Health Board staff, external partners and national networks, volunteering will continue to be developed in a coordinated, informed and sustainable way, ensuring it remains responsive to service needs and adds value to people's experience.

3.4 Communications and Profile Raising

To maintain an effective and sustainable volunteer population, ongoing recruitment is essential. Profile-raising activity and consistent communication play a key role in supporting this. Key elements include:

- Development and promotion of a clear and distinctive volunteer identity
- Ensuring volunteers are treated as an integral part of teams, with their contribution valued and recognised
- Volunteers being easily identifiable through the provision of uniforms and identity badges
- Effective use of a range of communication channels, including posters, engagement events, social media and the Health Board website
- Recognition and celebration of volunteer contribution through formal mechanisms such as certificates, badges and an annual Volunteer Thank You event
- Regular promotion of volunteering through online articles and positive publicity, highlighting volunteer achievements and impact
- Promotion of volunteering through using the Volunteer Management System Assemble and Health Board webpages.

4.0 RESPONSIBILITIES

4.1 Assistant Director of Patient Experience.

The Assistant Director of Patient Experience has accountability for the Volunteering agenda across Cardiff and Vale University Health Board.

4.2 Head of Patient Experience

The Head of Patient Experience facilitates the Patient Experience Agenda through managing the Voluntary Services Manager, ensuring that there are clear links to strengthen the interface with the Clinical Boards.

4.3 Voluntary Services Manager

The Voluntary Services Manager manages the Voluntary Services Team and Volunteer Programme; its projects, aims and objectives, as well as building partnership projects with external organisations, and liaising with Senior Health Board Staff to develop potential volunteer projects and opportunities.

4.3 The Voluntary Services Team

The team, consisting of Co-ordinators and Administrative Officers, with support from colleagues and managers, are responsible for undertaking the recruitment and placement of individual volunteers within the Health Board and providing a central point for information.

4.4 Area Manager Responsibility When Volunteers are placed

It is the responsibility of all colleagues e.g. Ward Manager, Nurse in Charge etc. within the area that volunteers are placed to:

- Undertake an area-based induction
- Understand the role of the volunteer within their service/department
- Support the volunteer in their role
- Ensure the volunteer does not undertake any activity other than what is stated in their volunteer role description
- Introduce the volunteer to patients / clients and colleagues in the service or department

4.5 Third Sector Support Service Lead/Manager

Any department/service within the Health Board wishing to involve volunteers through another organisation (e.g. third sector) must contact the Voluntary Services Manager for advice and guidance, prior to the placement of volunteers. It is fundamental that this is adhered to before the project commences.

4.6 Volunteers Responsibilities

It is the responsibility of all volunteers to act in accordance with Cardiff and Vale University Health Board's organisational values and behaviours as they are representatives whilst undertaking their role. Alongside this undertaking all

mandatory recruitment checks and training as outlined in their conditional offer and adhering to all elements outlined within the Volunteer Agreement, which includes maintaining confidentiality.

5.0 VOLUNTEER PROVISION

Volunteer opportunities continue to increase on an annual basis across the Health Board. Volunteers include individuals with lived experience, contributing meaningfully to services and enhancing people's experience of care. In addition, there are well-established and successful partnerships with a range of external voluntary organisations, universities, colleges and local schools, supporting access to volunteering and strengthening links with communities and educational settings.

6.0 UNDERLYING PRINCIPLES

This Framework is underpinned by the Welsh Government's Volunteering Policy *"Supporting Communities, Changing Lives"* 2015 and the WCVA *Code of Practice for Involving Volunteers* 2020.

The following core principles have been established within the Health Board, ensuring that volunteers are;

- Valued and recognised for their contribution
- Supported, supervised and treated fairly
- Safe and appropriately trained for their roles
- Included in the planning, development and evaluation of volunteer services
- Able to reclaim out-of-pocket expenses
- Enabled to volunteer in ways that are inclusive, accessible and reflective of the communities we serve

The Framework describes the scope and direction for volunteering during the next three years, ensuring that the principles outlined are achieved.

7.0 VALUES AND BEHAVIOURS

Cardiff and Vale University Health Board operates to a defined set of organisational values and behaviours which underpin all that we are and do as an organisation. Living our values supports us in providing person centred- care.

It is an expectation that everyone is committed to adhering to the Health Boards *'Values and Behaviours'*; from the point of application through to the day to day delivery of their roles. Volunteers are also expected to maintain these values; they are provided at induction and are included in the Volunteer Handbook.

OUR VALUES	OUR BEHAVIOURS	
	How we are with patients, families, carers and colleagues	
	What we want to see from individuals and teams...	What we don't want to see from individuals and teams...
Kind and caring		
Welcoming	•We will smile, be friendly, welcoming, polite and approachable	•We will not be abrupt, rude, show aggressive behaviour, shout or bully
Put people at ease	•We will put others at ease, be patient, calm and reassuring	•We will not ignore people or fail to offer support and we won't leave people scared and anxious
Value other people's time	•We will make time for people, consider their needs and make people feel comfortable	•We will not be 'too busy', in a rush or say we can't make time for others
Compassionate	•We will be kind, compassionate and look out for others	•We will not make people feel stupid, belittled or treat people as an inconvenience
Respectful		
Understanding	•We will put ourselves 'in other people's shoes' and show empathy and understanding	•There will be no hierarchy, no egos, no lack of understanding for other's needs
Attentive and helpful	•We will be helpful and attentive to the needs of others, protect people's dignity and respect people's time	•There will be no poor planning and inefficiency, we will not waste people's time or keep people waiting
Respectful	•We will value everyone as an individual and treat people equally and fairly	•We will not put people under pressure or show favouritism, not be unfair or leave people feeling disempowered
Appreciative	•We will recognise people's strengths, say thank you and celebrate success, empower and bring out the best in others	•We will not blame and criticise or make judgments or assumptions. We will not take people for granted or forget to say 'thank you'
Trust and integrity		
Listen	•We will take time to listen to and consider other people's views	•We will not ignore other people's views or ideas or be dismissive of other's opinions
Clear communication	•We will communicate honestly and openly, offer clear explanations, keep people informed and updated	•We will not have unclear communication, a lack of transparency or give misleading or contradicting information
Teamwork	•We will involve others, work as a team, share information and follow up	•We will not make decisions in isolation and fail to communicate with other teams / services
Speak up	•We will seek and give feedback, encourage and support people who speak up	•We will not make people feel afraid to speak up and constructively challenge or reject feedback
Personal responsibility		
Positive	•We will be enthusiastic, positive, pro-active and have a 'can do' approach	•We will not be negative, moan, complain, and we will not 'sit back'
Professional	•We will be professional, consistent, a role model and lead by example	•We will not be unprofessional, inconsistent or lack pride in our work
Excel	•We will take ownership and responsibility for providing a safe and excellent service	•We will not pass the buck, say 'it's not my problem' and fail to deliver on our promises
Keep improving	•We will be committed to learning and improving and developing ourselves and others	•We will not put up barriers to new ways of learning and doing things

8.0 FUTURE DEVELOPMENTS

- 8.1 Grow Partnership working with Third Sectors and Charities
- 8.2 Establish a robust Emergency Unit Volunteer Team
- 8.3 Collaborate with Health Board Departments/Areas to establish volunteer placements in areas not currently supported

9.0 PARTNERSHIP WORKING WITH STAFF REPRESENTATIVES

It is recognised that the successful delivery of this Framework is dependent on effective partnership working with staff representatives. Ongoing engagement with staff-side colleagues will support shared understanding of the purpose, scope and value of volunteering activity, ensuring that volunteer roles complement and enhance services for patients, families and carers, while clearly respecting and protecting the roles and responsibilities of paid staff.

Wales Council for Voluntary Action (WCVA) and Wales Trades Union Congress (Wales TUC).

This Charter, published in 2020, stands between WCVA and Wales TUC as a statement of principles and good practice. It is commended for use:

- by individual unions, volunteer involving organisations in Public.
- by third and private sectors and other bodies, to stimulate discussion and good practice regarding the appropriate, harmonious and mutually rewarding involvement of volunteers.

10.0 EQUALITY STATEMENT

Cardiff and Vale University Health Board is committed to providing safe, high-quality, person-centred services that recognise and respond to the diverse needs of the communities we serve. We work to ensure that no individual or group is discriminated against, harassed, or victimised on the basis of age, disability, sex, gender identity, pregnancy or maternity, marital or civil partnership status, race, religion or belief, sexual orientation, Welsh language, socio-economic status, or any other protected characteristic. This commitment reflects our legal duties under the Equality Act 2010 and Human Rights Act 1998, and it underpins the way we deliver care, support our workforce, and design our services.

Our approach is guided by the Health Board's **Strategic Equality Objectives 2024–2028**, which set out our ambition to create an inclusive, responsive, and equitable healthcare system. Our objectives focus on:

- **Respect:** Ensuring people are and feel respected in all interactions with our services and workforce.

- **Communication and Engagement:** Improving how we communicate and involve people, ensuring that information and engagement opportunities meet the diverse needs of our population.
- **Accessibility:** Removing barriers so that more people can access care that meets their individual requirements, including those experiencing health inequalities.
- **Data:** Strengthening how we collect, use and analyse equality data to identify inequities, measure progress, and target improvements across services.

We recognise the responsibility we share with our staff, volunteers, Board members, partners, and contractors in creating an inclusive culture. Everyone working on behalf of the Health Board is expected to uphold our values, promote fairness and dignity, and take proactive steps to eliminate discrimination.

To support equitable service delivery and decision-making, we undertake **Equality and Health Impact Assessments** when planning, reviewing, or changing services. These assessments help us understand the potential impact on people with different protected characteristics and ensure that any negative effects are minimised, while opportunities to promote equality are strengthened.

As part of our commitment to continuous improvement, we engage with patients, communities, staff networks, and equality organisations to shape our objectives and measure our progress. This collaborative approach ensures that our Strategic Equality Plan remains grounded in the lived experiences of the people we serve.

We are committed to building an environment where all staff and volunteers can thrive, with equitable access to training, development, and opportunities. Inclusive employment practices and fair workforce policies form a core part of our commitment to delivering outstanding care and fostering a representative workforce.

11.0 **LIABILITY AND INSURANCE**

In recognition of its legal obligations to patients, staff, volunteers and others affected by its activities, Cardiff and Vale University Health Board is a member of the Welsh Risk Pool, the mutual organisation that supports NHS bodies in Wales by providing indemnity in respect of liabilities arising from their healthcare and associated activities.

Volunteers who are appropriately recruited, authorised and acting on behalf of the Health Board within the scope of their agreed volunteer role will be covered by the Health Board's indemnity arrangements, including those provided through the Welsh Risk Pool, where a legal liability attaches to the Health Board.

This indemnity does not constitute personal accident, sickness, travel or personal belongings insurance for volunteers.

The University Health Board does not accept responsibility for the loss of, or damage to, volunteers' personal property, whether arising from theft, fire, accidental damage or other causes. Volunteers are therefore advised not to bring valuable personal

belongings onto Health Board premises unless necessary for their volunteering activities.

Where possible, secure storage facilities will be made available for volunteers' personal belongings; however, items remain the responsibility of the volunteer.

12.0 DISTRIBUTION

This Framework will be made available on the Health Board's Sharepoint and Internet sites.

13.0 REVIEW

This Framework will be reviewed in three years' time unless there are any changes in legislation or practice.

14.0 SOURCES OF INFORMATION

A Charter for Strengthening Relations between Paid Staff and Volunteers

<https://wcva.cymru/wp-content/uploads/2020/02/WCVA-TUC-Documents-Web-English-F2.pdf>

The Wellbeing of Future Generations Act

<https://www.futuregenerations.wales/about-us/future-generations-act/>

Volunteering Policy Supporting Communities, Changing Lives

<https://www.gov.wales/volunteering-policy-supporting-communities-changing-lives>

A Healthier Wales – Our Plan for Health and Social Care

<https://www.basw.co.uk/system/files/resources/180608healthier-wales-mainen.pdf>

Social Services and Well-being (Wales) Act 2014

https://www.legislation.gov.uk/anaw/2014/4/pdfs/anaw_20140004_en.pdf

Helpforce

<https://www.helpforce.community/about/>

People Experience Framework

<https://www.gov.wales/sites/default/files/publications/2025-04/peoples-experience-framework-2025.pdf>

Shaping Our Future Wellbeing

<https://cavuhb.nhs.wales/about-us/our-mission-vision/shaping-our-future-wellbeing-strategy/>

Cardiff and Vale University Health Board

Volunteering Operational Procedure

15.1 Introduction

Cardiff and Vale University Health Board recognises the unique and important contribution that volunteers make in complementing the services it provides. The Health Board supports and encourages the efforts of individual volunteers and voluntary organisations for the benefit of service users, their relatives and carers. This presents opportunities for development of new roles within volunteering which complement the services provided by the paid workforce, whilst engaging the expertise of service users. The development of volunteering is very much a key part of the future strategic direction of Cardiff and Vale University Health Board. Therefore, explicitly stating the processes necessary within this Operational Procedure will safeguard our patients and also volunteers, and maintain exemplary governance within the organisation.

15.2 First Steps when Considering Volunteer Support

Initially, contact the Voluntary Services Team for advice, then:

Step 1 - Developing a Volunteer Role Description

Producing a Volunteer Role Description can be undertaken in partnership with the Voluntary Service Manager and Area Manager. Staff Representatives will be consulted when developing new volunteer roles to ensure appropriateness for prospective volunteering activity that doesn't replicate duties undertaken by paid staff members. Volunteer Role Descriptions may already be in place and suitable for the Area. Following this a Risk Assessment will be undertaken by the Voluntary Services Manager and the Area Manager.

Step 2 – Consider Potential of Lone Working

The nature of some voluntary work means that volunteers may be at times undertaking activity in the community and they may be at greater risk where their volunteering occurs away from a controlled environment such as a ward or department. This can include providing a befriending service in the community, service which involves contact with the general public or activities with vulnerable people. Area Managers working in conjunction with the Voluntary Services Team will ensure that appropriate risk assessments, checks and safeguards are in place. Where appropriate specific training will be provided for volunteers and advice sought from Health and Safety Department.

Step 4 – Consider Support and Supervision

Adequate support/supervision will be available to each volunteer. The type and level of support will depend on the needs of the volunteer and the role they have undertaken.

Each volunteer must have a clearly identified contact who is responsible for their day-to-day support and guidance. Staff/colleagues based in the area in which the volunteer is placed will also be expected to provide support as appropriate, and in the absence of the identified contact person their deputy or nominated person.

Opportunities will also be provided through meetings, training and social events to meet other volunteers for mutual support and discuss issues of common interest.

Additionally, the volunteer can contact the Voluntary Service Team to arrange a one-to-one discussion at a mutually convenient time.

15.3 Recruitment

The recruitment and selection procedures outlined are intended to encourage rather than limit volunteering with Cardiff and Vale University Health Board. They ensure that volunteer selection procedures are in line with the ethos of equality as demonstrated in the Strategic Equality Plan, Health and Safety and Welsh Language policies/procedures and other good practice. This will ensure the protection of service users, paid staff and volunteers.

The Voluntary Service Team promotes their opportunities and projects with prospective volunteers through a variety of mediums. Also, any enquiries that are received are provided relevant information about volunteering opportunities.

Applications are received electronically through the Volunteer Management Software Assemble. The option is also given to receive a paper application form to return to the Voluntary Services Offices. The recruitment process which follows is undertaken via Assemble.

The initial assessment of applications will be undertaken by the Voluntary Service Team ensuring fairness and that due process is followed. Where the prospective volunteer is deemed to be unsuitable for the role they have applied for, they will be

informed of the reasons and where applicable referred to other agencies such as the Volunteering Wales website.

The Voluntary Services Team will invite successful applicants to a short interview. The Team will set the dates, contact applicants and arrange the interview panel, which will consist of a Voluntary Service Team member and appropriate Area Manager or another designated staff member.

If the prospective volunteer is then deemed to be unsuitable for the role applied for they will be informed of the reasons. If they are more suitable to another internal volunteer role this will be offered, or they will be referred to Volunteering Wales. If unsuitable for an internal role their application and information provided will be anonymised in line with the Cardiff and Vale University Health Board Data Protection Policy.

It is the responsibility of the individual volunteers in receipt of benefits to declare their voluntary activity to their benefit advisor/agency/Jobcentre Plus. The organisation which they volunteer for is not obliged to action anything. There may be occasions when the Job Centre may ask claimants for further information about their activities as a volunteer. Voluntary Services Team can provide information to the benefits office if required.

It is the responsibility of the Voluntary Services Team to ensure that:

- Prior to recruiting volunteers in a department or community setting, consultation and discussion should take place with area managers to ensure that there is a genuine need for volunteers, along with a robust, clear agreed role description.
- Volunteers under the age of 18 years are aware of the limitation to the roles they are able to undertake, additionally there is a necessity for parental/guardian consent to be sought.

There are a number of pre-conditions which should be met before a volunteer can be recruited:

- Risk assessment to be undertaken by Area and Voluntary Services Manager pertaining to the volunteering role.
- Determine if a criminal records (DBS) check is required, also considering what level is required.
- Identify adequate support and supervision and a named staff member identified as a point of contact.
- Ensure that Lead/Senior Nurse is aware of the volunteers being placed in the area
- Agree any induction and relevant training that will be required and how this can be provided and funded.
- Ensure staffing team commitment to working with the volunteer(s).

- Ensure the role is appropriate for a volunteer rather than a paid worker and does not replace paid work.
- Identify how the role will allow the volunteer to feedback important information.
- Consideration should be taken as to how the project can be evaluated.
- Implementation if deemed appropriate of a collaboration agreement between Voluntary Services and Area Staff involved.

15.4 Voluntary Services Team Responsibilities

The Voluntary Services Team will be responsible for overseeing the recruitment and placement of individual volunteers within Cardiff and Vale University Health Board.

The Voluntary Services Team will ensure that they keep up to date with current legislation and guidelines relating to volunteers. Ensure that volunteers are made aware of relevant Health Board policies and procedures. Ensure that their health, safety and welfare at work is supported in the same way as for employees.

Recruitment of Volunteers

The Voluntary Services Team will:

1. Maintain a volunteer database in accordance with the Health Board's Information Security Policy and GDPR guidance.
2. Request the relevant recruitment checks for new starters which will include a Health Board DBS check, occupational health clearance and two satisfactory references.
3. Maintain a confidential personal file for each volunteer in accordance with the Health Board's Information Security Policy. These will be kept secure with strictly limited access, for which the procedures will be explained to all volunteers during their induction period and will be destroyed of in accordance with Cardiff and Vale Health Board's Data Protection Policy.
4. Ensure completion of mandatory training, induction, and any role specific additional training such as Manual Handling, Violence and Aggression, and Dementia Awareness. Training and induction material delivery will be adapted to suit volunteer needs.
5. Ensure completion of an area induction with a suitable member of staff relevant to the area/ward.
6. Ensure volunteers have signed the '*Volunteer Agreement*' which includes the Health Boards Confidentiality Agreement, Emergency Contacts and Media consent and have been provided with a Volunteer Handbook.

7. Provide Area Managers with training, advice, support and guidance for volunteers.
8. Ensure Area Managers are aware of the volunteers' role and how they should be managed within the workplace.
9. Advise and support volunteers if required and regularly review their progress.
10. Take responsibility for volunteer services not directly under the supervision of any department or ward e.g. Welcome Team.
11. Ensure that the contributions of volunteers are recognised.
12. Work in liaison with the Area Manager, ensuring volunteers receive appropriate training, support and supervision for their role.
13. Appropriately reimburse volunteer out of pocket expenses and maintain the records of this activity.
14. Develop closer links with existing voluntary organisations delivering services for and on behalf of the UHB thereby developing closer links with the wider community, including implementation of Memorandums of Understanding (MOU) when working with external organisations.

Placement and Support

Once a suitable volunteer placement has been identified, details about the frequency and nature of the voluntary activity should be determined. Cardiff and Vale University Health Board reserves the right to ask volunteers to discontinue their voluntary role and will give the reasons in writing if requested. If this situation occurs every attempt will be made to offer an alternative placement.

Each volunteer will have an identified contact person who they will report to, who is responsible for their day-to-day support, guidance and feedback on a regular basis. In the absence of the identified contact person this responsibility will fall to their deputy or other named staff member. In addition, the Voluntary Services Team will meet with the volunteer for support/supervision as and when required.

Details of identified staff member supervising volunteers will be provided at the first volunteer session during Area Induction.

Volunteer Induction

Once all recruitment checks have been processed the volunteer induction will be arranged. Volunteers will be asked to read and sign a Volunteer Agreement if they have not done so already. Copies of all signed agreements will be kept on their personal file. Following Induction volunteers will have access to the Assemble platform which holds the Volunteer Handbook. Paper copies will be provided on request.

Confidentiality

All volunteers are expected to comply with the Health Board's Data Protection Policy by signing of the confidentiality statement. All Health Board information including patient, clinical, financial, employee, contractual details of any kind is regarded as strictly confidential. It is essential that all volunteers understand the absolute need for confidentiality to safeguard both our patients and staff and that any breach will be taken very seriously by the Health Board.

15.5 Area Manager Responsibilities

Ward Managers, Nurses in Charge, Area Managers or designated staff members are responsible for:

- The development of the volunteer role description in partnership with the Voluntary Services Manager.
- Undertaking risk assessments for each individual volunteering opportunity identified within the area in line with the Health Board's Health and Safety Risk Assessment procedure.
- The volunteers placed within their area, ensuring that all appropriate procedures are adhered to, and operational accountability for the volunteer and ensure that they are supported within the service/department. This will include clear management and reporting arrangements for the volunteer which are made known to both the volunteer and the Voluntary Services Team.
- Liaising with the Voluntary Services Team where issues arise relating to the volunteer that may require support/guidance/advice relating to legislation and or other concerns.
- Ensuring, in partnership with the Voluntary Services Team, that volunteers receive the appropriate training for their role including completion of departmental area induction.
- Ensuring the volunteer undertakes their role in accordance with their identified role description and that they are not requested to assist in or undertake any activity other than stated in their volunteer role description.
- Ensuring that the volunteer is made aware of relevant Health and Safety policies and procedures within Cardiff and Vale UHB including any local policies, practice or guidance in the area placed.
- Understanding and supporting the volunteer in their role and explain any areas where the volunteer may be unsure.

- Introducing the volunteer to service users and other staff members in the service or department.
- Ensuring volunteers feel part of the team and that their role is recognised within the team structure of the area they are placed.
- Working with the Voluntary Services Team to ensure that the contributions of volunteers are recognised e.g. Volunteer Awards, Volunteers' Week Celebrations and Annual Thank You Events.

In some instances where impartiality is integral to the volunteering role, other voluntary organisations may take responsibility for the supervision of the volunteer in liaison with the Area Manager and Voluntary Services Team.

Support and Supervision

Each volunteer will have an identified contact person who they will report to, who is responsible for their day-to-day support, guidance and feedback on a regular basis. In the absence of the identified contact person this responsibility will fall to their deputy or other named staff member. In addition the Voluntary Services Team will meet with the volunteer for support/supervision as and when required.

Details of identified staff member supervising volunteers will be provided at their first volunteer session.

Department Area Induction

Orientation to the area in which placed and general housekeeping, including but not limited to their named contact person.

Induction material and its delivery should be adapted to suit the individual volunteer needs.

15.6 Volunteer Responsibilities

It is the responsibility of the volunteer to:

- At interview and through the application process disclose any criminal convictions or cautions to the Voluntary Services Team.
- Agree to be DBS checked (Disclosure and Barring Service), provide two references and complete an Occupational Health Questionnaire. Failure to provide this documentation will result in withdrawal of the offer of a volunteer position at the UHB.

- Follow the instructions or guidance given to them by the Area Manager or named staff member to whom they report.
- Use the online rota to sign up for volunteer shifts, for coordination, statistical and safety reasons. Also, to sign in on arrival to the ward and sign out if a ward is using a physical volunteer folder.
- Adhere to the Health Board's values and behaviours at all times.
- Follow the policies and procedures of Cardiff and Vale University Health Board, as appropriate for their role.
- Ensure they consider the health, safety and welfare of themselves and others as they undertake their role.
- Undertake their role in accordance with their volunteer role description ensuring that they do not take on responsibilities or duties not specified.
- Undertake any training deemed necessary to their role by their area manager or Voluntary Services Team.
- Undertake their role in accordance with their volunteer role description ensuring that they do not take on responsibilities or duties not specified.
- Inform their department if they are unable to undertake their role due to sickness or other reason as soon as possible for alternative arrangements to be made.
- Inform and seek advice from their benefits advisor prior to commencement of their volunteer role if in receipt of state benefits.
- Return identification badges, uniform and any other equipment provided by University Health Board when their volunteer role ends.

Uniform

Volunteers welcome the opportunity to wear a uniform as it clearly identifies their role within the multi-disciplinary teams that they volunteer within. A uniform provides a recognised identity and a sense of belonging.

Volunteers will be expected to wear any uniform provided by the Voluntary Services Team. This provides the volunteer with a distinct identity and allows patients and staff to recognise them. Also, for infection control and health and safety we would expect:

- Enclosed comfortable shoes
- ID badge with full name, identifying them as a volunteer within the organisation
- Long hair tied back
- No jewellery, other than a wedding band
- Bare below the elbow in clinical areas

- No nail varnish
- No dangly earrings or necklaces and no wrist watches

Any role or area specific requirements will be communicated to the volunteer on induction.

15.7 Reimbursement of Expenses

The Voluntary Services Team is responsible for informing volunteers before the commencement of their voluntary activity of the arrangements for claiming reimbursement. The standard form of reimbursement will be via BACS payment or the Cashier's Office dependant on which site the volunteers are based on. Reasonable expenses include travel to and from the voluntary placement and a luncheon voucher if volunteering for the entire day.

- Volunteers are expected to use their own or public transport whenever possible. Travel using own transport will be reimbursed at the organisations current mileage rate. Public transport (bus and rail) will be reimbursed at cost. Reimbursement of taxi fares will need to be agreed prior to the activity by the Voluntary Service Manager. Reimbursement for a car not driven by the volunteer will not be able to be claimed.
- Volunteers are only permitted to claim travel expenses within the Cardiff and Vale UHB boundary lines.
- Volunteers will be required to complete a claim form for out of pocket expenses and provide receipts. These forms will be available from the Voluntary Services Team and to download from the Volunteer Management Software. It is the responsibility of the volunteer to send the completed expense form to the Voluntary Services Team including all original receipts.
- All other expenses incurred in relation to volunteering with the Health Board will be considered on an individual basis, these could include postage related costs, phone calls, printing, activity resources etc.
- The Voluntary Services Team will keep appropriate records of reimbursements made.

15.8 Problem Solving

Cardiff and Vale University Health Board staff and volunteers will work co-operatively ensuring that both parties jointly benefit from the roles undertaken. However, on occasion, difficulties may occur which cannot be resolved through normal support channels. The Health Board aims to treat all volunteers fairly, objectively and consistently. To deal with these situations, both parties will be able to use the Voluntary Services process for settling differences. The aim of the process is to assist both parties to find a mutually acceptable way of overcoming difficulties.

15.8.1 If the volunteer has a concern with a member of staff:

Stage one:

The first point of contact should be the Area Manager. At this first stage the aim should be to resolve the issue through informal discussion.

Stage two:

The Volunteer should inform the voluntary Services Manager of the concern and the discussion with staff. If unresolved the Voluntary Service Manager will aim to resolve it.

Stage three:

If the Volunteer feels there has still been no resolution, they should put their concerns in writing to the Head of Patient Experience and their decision will be final.

If a volunteer has a concern against a Voluntary Services Team member their first point of contact will be the Head of Patient Experience.

15.8.2 If a volunteer has a concern about a process, patient or relative

The volunteer will need to bring this to the attention of the Nurse in Charge at that time who will aim to resolve the concern, keeping the volunteer informed throughout the process. If the volunteer believes the concerns have not been addressed they will need to bring it to the attention of the Voluntary Services Manager.

15.8.3 If the department has a concern about a volunteer

If a concern is received about a volunteer, for example, that they are unable to fulfil their role in a satisfactory manner, they have the right to be informed of the concerns brought against them, giving them the opportunity to state their case. The person who raised the concern should be kept informed.

Stage one:

The Area Manager should bring the concern to the attention of the voluntary Services Manager, and should aim to resolve the concern informally with the volunteer through discussion. The concern should be discussed and the volunteer should be offered support, encouragement and the opportunity to achieve the role in a satisfactory manner. Options such as additional support, supervision and training should be offered where necessary and clear aims along with a review date should be set.

Stage two:

If the concern has not been resolved at stage one of the process, the concern should be discussed further with the Voluntary Services Manager, where it will be raised in a formal meeting with the volunteer. Voluntary Services can, if appropriate, offer alternative roles, and will issue the volunteer a letter outlining the reason for the concern along with clear objectives and a review date. The volunteer can be accompanied at the meeting on these issues by another volunteer, staff member or friend.

Stage three:

If the problem is still not resolved a meeting involving the volunteer, Voluntary Services Manager and Senior Manager and/or Head of Patient Experience will be called. This may result in withdrawal of the voluntary position and the volunteer will be asked to leave. The volunteer can be accompanied at the meeting on these issues by another volunteer, staff member or friend.

If it is believed that the volunteer has behaved in a manner that has seriously affected the organisation; for example, committing serious misconduct (this may include, but is not limited to, theft, acts of violence, harassment, malicious damage, serious breaches of the letter or spirit of the equal opportunities policy and so on). They will be asked to temporarily stop volunteering while the matter is investigated by the Voluntary Services Manager and appropriate Area Manager. The Head of Patient Experience will be informed of the investigation. The volunteer will be able to put forward their account prior to a decision being made. If the concern is upheld the volunteer will then be asked to permanently cease volunteering with the Health Board. In all cases the volunteer can be accompanied at the meeting on these issues by another volunteer, or friend.

If the nature of the offence has been deemed of a serious nature where we require the involvement of e.g. Police, Social Services, advice and support will be immediately sought through the Health Board

15.9 Completion of Volunteering Role

Volunteers who wish to finish their volunteering activity should inform the department manager and Voluntary Services Team as soon as possible before leaving so that the leaving process can be correctly followed.

Cardiff and Vale Health Board reserves the right, in exceptional circumstances, to ask a volunteer to withdraw their help. The Health Board may at any time and for relevant reasons decide to end a volunteer's placement with the organisation following proper discussions with all parties.

Volunteers will be asked to complete an exit questionnaire at the end of their volunteering with the Health Board and return their ID badge and uniform.