

Volunteering Policy

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CONSULTATION AND DISTRIBUTION RECORD	
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Consultation Process / Stakeholders	Joint Policy Forum and Human Resources Forum Members
Distribution:	<ul style="list-style-type: none"> • NHS Lanarkshire Intranet • NHS Lanarkshire Public Website

CHANGE RECORD			
Date	Author	Change	Version No.
January 2010	Voluntary Services Manager Head of Patient Affairs	Revised Volunteering Policy to incorporate Vision of Volunteering and Volunteering Strategy	1
30 October 2012	Voluntary Services Manager	Amended front sheet Amended Stakeholders Improved accessibility of document	2
28 December 2012	Head of Patient Affairs	Improved accessibility of document	2
18 March 2013	Voluntary Services manager	Amend to include comments from engagement exercise	3
23 October 2015	Voluntary Services Manager	Amended front sheet Amended Stakeholders Highlighted fast track review	4
19 October 2016	Voluntary Services Manager	Continuation of sections that needed to stay Referencing of PIN Policy Updating of NHS Lanarkshire Volunteering Priorities	5

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16 November 2016	Voluntary Services Manager	Updated following engagement with Stakeholders	6
May`18	Deputy HRD	Policy reviewed against GDPR legislation:- no change required	6
November 2018	Voluntary Services Manager	Changes of Responsible Director following move of volunteering to HR	6
December 2019	Voluntary Services Manager Head of Human Resources	Regular Policy Review Additional Appendix on Staff Volunteering and the parameters for that Updated section on appropriate volunteer roles in light of STUC / VDS agreement reinstating statement on industrial action	7
January 2023	Voluntary Services Manager	Regular Policy Review Updated following engagement with Stakeholders	8

1. Introduction

1.1. Volunteers make a key contribution to the life and work of NHS Lanarkshire and the wider community it serves. The Scottish Government's National Framework for Volunteering defines it as

"A choice to give time or energy, a choice undertaken of one's own free will and a choice not motivated for financial gain or for a wage or salary."

(Volunteering for All, Our National Framework, Scottish Government, 2019)

The National Framework recognises that volunteering exists on a spectrum ranging from neighbourliness at an individual level to formal volunteering with an organisation at the other end. This policy is intended to demonstrate how NHS Lanarkshire will meet its obligations as a volunteer engaging and supporting organisation at the formal end of the spectrum.

The United Nations recognises four types of **volunteering** and each type can be evidenced in the NHS in Scotland. These are:

- Service giving
- Mutual support
- Influencing and advocating on behalf of others; and
- Participation in decision-making

(Strategy for Volunteering in the NHS in Scotland, Scottish Government 2008)

1.2. While successful implementation of this policy will ensure compliance with current legislation and national policy, NHS Lanarkshire also recognises both the moral and business case for maintaining good practice in relation to the involvement of volunteers within the organisation.

1.3. Volunteering in NHS Lanarkshire happens in a number of ways: the majority of volunteers are engaged directly by NHS Lanarkshire but others volunteer via a voluntary organisation. NHS Lanarkshire expects volunteers from voluntary organisations to follow the spirit of this policy and ensure that robust systems are in place to support safe, effective and person centred volunteering regardless of the source of recruitment.

2. Purpose

The purpose of this policy is to:-

- Establish NHS Lanarkshire as an organisation which is welcoming to volunteers.

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- Recognise that the role of volunteers within NHS Lanarkshire (whatever role they carry out) is complementary to the role of paid staff and does not substitute for it.
- Set out the expectations of NHS Lanarkshire for NHS Lanarkshire staff volunteering within the organisation in addition to their substantive posts.
- Set out the principles governing the involvement of volunteers and provide a set of procedures to ensure good working practice.
- Define the roles, rights and responsibilities of the organisation and its volunteers.
- Recognise that volunteering can benefit the health and wellbeing of the individual volunteer and has real benefits to the local community.
- Encourage and enable the involvement of volunteers from socially diverse backgrounds, recognising the pivotal role that NHS Lanarkshire has as anchor organisation in order to positively influence the health and wellbeing of the communities it serves.
- Establish a relationship between Voluntary Organisations in Lanarkshire and NHS Lanarkshire in order to improve the volunteer experience.

3. Scope

- 3.1 The Volunteering Policy, principles and accompanying procedures are intended primarily for use by NHS Lanarkshire employees and volunteers. The policy uses a risk management approach which facilitates volunteer involvement but ensures the safety of individual volunteers, NHS patients and staff.
- 3.2 A commitment to these principles is expected from voluntary organisations whose volunteers have a role within NHS Lanarkshire. NHS Lanarkshire respects the independence of these voluntary organisations and recognises that they are responsible for the management of volunteers working on specific projects.
- 3.3 Public Partnership Forums (PPFs) involve local service users, carers and the public in the improvement of health services and are facilitated by NHS Lanarkshire. Due to the completely different nature of involvement in PPFs, traditional approaches to volunteering and volunteering management are not always appropriate and they therefore do not come under the auspices of the Volunteering Policy.
- 3.4 NHS Lanarkshire will work closely with its Local Authority Partners to provide a co-ordinated approach to volunteering within the Health and Social Care Partnerships.
- 3.5 NHS Lanarkshire takes care to ensure your personal information is only accessible to authorised people. Our staff have a legal and contractual duty to keep personal health information secure, and confidential. In order to find out more about current data protection legislation and how

we process your information, please visit the Data Protection Notice on our website at www.nhslanarkshire.scot.nhs.uk or ask a member of staff for a copy of our Data Protection Notice.

4. Principal Content

4.1 There are many benefits derived from volunteering: to the organisation; to the patient; to the individual volunteer; and to the wider community. Volunteers improve the quality of patients' experiences: giving patients the opportunity to spend time with volunteers allows staff to devote more time to professional roles. Patients, in particular those who are socially isolated, benefit from volunteer input and friendship. The wider community benefits greatly from an NHS which is more reflective of, and reactive to, the needs of local people.

However, the greatest benefit of volunteering should be to the individual volunteer. Volunteering brings a range of health benefits, particularly to the mental health and wellbeing of the volunteer. It increases self-confidence, develops and renews skills and provides a sense of belonging. NHS Lanarkshire therefore strives to provide a high quality volunteering experience.

4.2 NHS Lanarkshire believes that volunteers are complementary to the role of paid staff and do not substitute for them. We are committed to ensuring that:

- Tasks carried out by volunteers do not replace the work of paid employees.
- All volunteer opportunities offered by NHS Lanarkshire will have formal volunteer role descriptions which are endorsed by the NHS Lanarkshire staff side as appropriate tasks for volunteers to undertake using the following principles: -
 - Volunteers are not permitted to take on tasks formerly undertaken by paid employees or to work in ways which facilitate a decrease in paid employment.
 - Volunteers do not take on tasks which have been identified as necessary for the delivery of clinical care but are not currently part of the funded establishment. This includes administrative support roles.
- The management of the volunteers should take place at as close a level as possible to where the volunteers are placed. This means that :-
 - Staff at all levels and those who use the service are clear about the role of volunteers so as to foster good working relationships between staff, patients, service users and volunteers.
 - Training and support is provided to those working alongside volunteers.
 - Staff at ward and operational levels take an active role in introducing and supporting volunteers into their new roles.

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- The safety and wellbeing of patients, users of the service and staff are paramount. The standards of care and conduct for volunteers must be of the same high quality as that for paid staff.
- At times of industrial action within the organisation, volunteers should not be asked to take on any of the duties that would otherwise be carried out by a member of staff who is on strike.

5. Aims and Objectives

5.1 NHS Lanarkshire has a Strategic Improvement Plan for volunteering which was last updated in October 2022 following input from stakeholders. The main Strategic Aims are:

**Volunteering is 'owned' by all of those who have an interest in it.
Volunteering in Lanarkshire puts patient and volunteer safety at its heart and is volunteer centred
Volunteering activity is actively evaluated to demonstrate the impact that it has on volunteers and patients**

5.2 Relationships with Voluntary Organisations

5.2.1 NHS Lanarkshire will maintain and develop relationships with the community and voluntary sector in Lanarkshire, encompassing:

- Voluntary organisations providing services
- Partnerships with voluntary organisations to provide services within the NHS
- Voluntary Action North Lanarkshire and Voluntary Action South Lanarkshire
- Community planning partners, including educational establishments and job centre plus.

5.2.2 NHS Lanarkshire recognises that voluntary organisations providing a service to the NHS, such as the Royal Voluntary Service, are independent organisations with their own identities and values. However, NHS Lanarkshire expects voluntary organisations to adopt similar standards to NHS Lanarkshire in the recruitment and selection of volunteers. Individuals who volunteer with these organisations should be subject to the same level of vetting as individuals who volunteer with NHS Lanarkshire directly. A Service Level Agreement will be drawn up so that both the voluntary organisation and NHS Lanarkshire will be agreed on the standards expected.

5.2.3 NHS Lanarkshire values its relationship with Voluntary Action North Lanarkshire and Voluntary Action South Lanarkshire who have a role not only in signposting volunteers to the NHS but also in working with the NHS to promote volunteering to the local communities and to NHS staff.

6. Access and Equality

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6.1 A Flexible Approach to Volunteering within NHS Lanarkshire

NHS Lanarkshire recognises that individuals may want to volunteer with our organisation in different ways. They may want to get involved at a particular hospital, in a particular role or with a particular public health campaign. Therefore volunteers may stay with the organisation for a prolonged period or may only want to be involved in a time-limited campaign. It is important that the volunteering programme is flexible enough to allow this to happen.

However, all volunteers need to undergo the same recruitment and selection procedure regardless of whether they intend their volunteering to be fixed term or on-going.

Given the cost to the organisation of resourcing the volunteer recruitment process, NHS Lanarkshire will expect a minimum commitment of at least one session a week for at least 6 months from every volunteer.

6.2 NHS Lanarkshire does not operate a minimum or maximum age for volunteering opportunities. For opportunities where a criminal record disclosure or PVG membership is required there is a minimum age of 16 in order to carry out appropriate levels of screening.

6.3 Older volunteers should be treated as individuals with the only measure of suitability being their capability to carry out duties in a safe manner and in line with the organisation's policies and procedures. Where older volunteers are no longer able to conduct their duties, consideration should be given to changing their role or to redeployment elsewhere in the organisation. Where this is not possible the volunteer should be supported to retire with dignity. This may include taking on another voluntary role with other organisations. Advice should be sought from Salus Occupational Health.

6.4 NHS Lanarkshire welcomes volunteers from all parts of Lanarkshire and will not make any assumptions about volunteers being able to afford to subsidise their volunteering. No volunteer should be expected to be out of pocket as a result of volunteering.

7. Health and Safety

7.1 Health and Safety at Work etc Act 1974

Under the Health and Safety etc. Act 1974 there is a duty of care imposed upon NHS Lanarkshire as the employer as well as a duty on the volunteer to take reasonable care to avoid injury to themselves and others.

The duty extends to the provision of such information, instruction and training as is necessary to ensure, so far as is reasonably practicable, the health and safety at work of employees, including volunteers.

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Volunteers have a duty to co-operate with NHS Lanarkshire so far as is necessary to enable the employer or any other person to comply with a duty or requirement imposed by health and safety law.

7.2 Volunteer Roles

All volunteer roles have a written role description and risk assessment carried out for the tasks that the volunteer would be expected to undertake. This will ensure that all appropriate steps are taken to provide a safe/ healthy and effective work experience. Additionally, all volunteers will be expected to receive Occupational Health clearance in order to volunteer with the organisation. This will require all volunteer roles to have a Job Analysis Framework completed based on the role description and risk assessment.

7.3 Risk Assessments

Careful attention must be paid to the Health and Safety (Young Persons) Regulations 1997, which were incorporated into an amendment of the Management of Health and Safety at work regulations in 1999.

Where volunteers under the age of 18 are involved, the Voluntary Services Manager is required to refer to Section 3B of the Health and Safety Control Book to complete a risk assessment evaluation of the potential risks to any young person. This should include physical and psychological risks.

7.4 Infection Prevention and Control

It is important that volunteers follow the same policy guidance on infection control as all NHS Lanarkshire employees. Volunteers are advised of infection prevention and control guidance during their induction. At periods where wards are closed for infection control reasons, volunteers are not expected to attend. When individual rooms are closed for infection prevention and control reasons, volunteers are able to attend but not to access rooms where patients are isolating.

If there are any issues around infection control during the volunteering then the local contact will raise this with the Voluntary Services Department who will liaise with the Infection Control Team.

7.5 Confidentiality: Patient consent / Volunteer information

7.5.1 Volunteers must work within the NHS Lanarkshire Information Security Policy. Information on the importance of confidentiality is included in the volunteering handbook pack, together with an understanding agreement.

7.5.2 Personal information provided by volunteers will be used only for the purposes of registering the volunteer and ensuring a safe volunteering experience. This information will be stored according to the NHS Lanarkshire Information Security Policy.

7.6 Disclosures / Protection of Vulnerable Groups

Volunteers are expected to undergo the appropriate level of disclosure for the volunteer role that they will be carrying out. This may mean that the volunteer is expected to become a member of the Registered Workforce through applying for a PVG check. Volunteers are expected to update PVG about changes to addresses etc to keep their PVG registration current.

If the volunteer role is not appropriate for PVG registration then the volunteer will be expected to undergo standard disclosure.

The methods of determining which level of check is appropriate and the organisational approach to dealing with criminal convictions disclosed through the recruitment process is outlined in NHS Lanarkshire's Recruitment and Selection policy and these will apply to volunteers.

7.7 Health checks

All volunteers undergo NHS Lanarkshire Pre-Placement Occupational Health Screening and will not be able to commence volunteering until clearance has been received.

7.8 Insurance

NHS Lanarkshire is a member of CNORIS and is effectively self-insuring for anything other than major incidents.

7.9 Reporting Accidents and Incidents

The reporting procedure for all NHS Lanarkshire staff should also be used for volunteers. In addition to this the staff member making the report should inform the Voluntary Services Department.

8. Resourcing Volunteering in NHS Lanarkshire

NHS Lanarkshire recognises that the development of a high quality volunteering programme requires investment of both staff time and resources. No volunteer should be financially disadvantaged by contributing their time to NHS Lanarkshire.

NHS Lanarkshire will resource the costs of volunteering such as marketing, recruitment, vetting, training and support.

NHS Lanarkshire will set out the arrangements for reimbursement of out of pocket expenses for volunteers as part of a separate policy which will be reviewed annually in line with appropriate HMRC guidance on out of pocket expenses.

9. Communications Plan

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The policy and procedure will be communicated via the NHS Lanarkshire Internet and Intranet. Articles referring to the policy will be carried in the Pulse, volunteer newsletter and staff briefs.

10. Quality Improvement – Monitor and Review

This policy will be reviewed every 3 years by the Voluntary Services Manager. The review will include the appendices to the policy. The reviewed policy will be reported through the Healthcare Quality Assurance and Improvement Steering Group & Human Resources Forum before final ratification.

11. Equality and Diversity Impact Assessment

This policy meets NHS Lanarkshire's Equality and Diversity Impact Assessment.

12. Appendices

12.1 Volunteering Procedures Appendix 1

12.2 Protocol for NHS Lanarkshire Staff undertaking Volunteer Roles within the Organisation Appendix 2



Volunteering Procedures

Prepared by: Voluntary Services Manager

Lead Executive Director: Director of Human Resources

Approved by: Human Resources Joint Policy Forum
Staff Governance Committee

Previous Version/Date: January 2020

Version Number/Date: Version 7/ November 2022

Revision Date: December 2026

1.1 Recruitment and Selection

NHS Lanarkshire:-

- Requires all volunteers to complete an Application Form, Occupational Health Declaration and either evidence of PVG scheme membership or standard disclosure as appropriate to the role that the volunteer will be carrying out prior to appointment. All volunteers must provide references as requested. If volunteers are required to be members of the registered workforce then NHS Lanarkshire will countersign applications for PVG scheme membership. If potential volunteers are already scheme members then NHS Lanarkshire will request a Scheme Record Update.
- Will place volunteers in accordance with rigorous volunteer recruitment and selection procedures and with due care and attention to the process of matching volunteers' needs and service requirements.
- Will make all reasonable effort to find placements for everyone who offers their time and energy and who have undergone the screening programme. Where there is no placement available or an individual does not meet the disclosure requirements of the organisation, the volunteer will be informed of the reason and referred, where applicable, to another agency such as the local Volunteer Centre.

1.2 Age Limits for Volunteering in NHS Lanarkshire

- 1.2.1 There is no minimum or maximum legal age that people can give their time as volunteers. What does apply is the general law of duty of care which all members of the public are required to observe. However requirement for PVG / Standard Disclosure for most volunteer roles means that for roles with patient contact, the minimum age for volunteering is 16.
- 1.2.2 Children and young people under 16 years of age can and do make a responsible and active contribution to society through volunteering and community involvement. The organisation has an enhanced duty of care to ensure they are involved in a sustainable way which ensures their safety and protection from harm.

An individual risk assessment will be undertaken by the Voluntary Services Manager in conjunction with the Senior Nurse / Service Manager in advance to assess the risks to the health and safety of the young volunteer. In addition the Protection of Children

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(Scotland) Act 2003: Guidance for Organisations and the Board's Child Protection Policy and Guidelines will be followed to ensure that children and young people who are volunteering are protected and appropriate safeguards are in place. This may mean that there are a significant number of volunteer roles (such as volunteering within certain clinical areas) that are deemed to be unsuitable for volunteers under the age of 16. Parents / guardians of volunteers under the age of 16 will also be asked to give consent to their child volunteering.

1.2.3 Older volunteers should be treated as individuals with the only measure of suitability being their capability to carry out duties in a safe manner and in line with the organisation's policies and procedures. Where older volunteers are no longer able to conduct their duties, consideration should be given to changing their role or to redeployment elsewhere in the organisation. Where this is not possible the volunteer should be supported to retire with dignity. This may include taking on another voluntary role with other organisations. Advice should be sought from SALUS on the suitability of a volunteer for a particular role based on their own personal risk factors

1.3 Support, Supervision and Recognition

- Each volunteer will be assigned a named contact person for supervision and support and will be given clearly specified lines of accountability.
- The role of the volunteer will be regularly reviewed to ensure that they have the necessary support, encouragement, guidance and training, if appropriate, to undertake the assigned task.
- Volunteers will be expected to conduct themselves in a reasonable manner, perform their task(s) to an acceptable standard and comply with organisational policies and procedures. When this standard is not met, appropriate support will be offered. If the volunteer does not then improve sufficiently, their involvement will be reviewed in line with the NHS Lanarkshire procedure for Dealing with Volunteer Conduct.
- In the case of serious breach of conduct or inability to perform agreed tasks, the organisation reserves the right to end the services of the volunteer. This will be done via a fair and transparent process as laid out in the NHS Lanarkshire Procedure for Dealing with Volunteer Conduct.
- On the basis of their voluntary work, volunteers may request a reference from their named contact person. Volunteers would require to have volunteered for a minimum of six months.

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- The work of volunteers will be recognised and acknowledged by NHS Lanarkshire on a regular basis.

1.4 Expenses and Insurance

NHS Lanarkshire will ensure that:

- Volunteers are adequately covered by insurance whilst they carry out their agreed duties both on the Board's premises and in the community.
- Volunteers are given information on other legislation and policies which may affect them (e.g. Health and Safety).
- Volunteers are treated in the same way as paid staff for liability purposes.
- Provision of volunteer expenses are costed and included at the outset of any new volunteer involving project within NHS Lanarkshire.

1.5 NHS Lanarkshire's Expectations of Volunteers

Volunteers are expected to:

- Participate in induction sessions and other training specific to the assigned task(s), including PAMOVA (Prevention and Management of Violence and Aggression).
- Comply with all NHS Lanarkshire policies and procedures, particularly in relation to confidentiality, accident reporting and health and safety.
- Access immunisation protocols as advised and be informed of routine control of infection procedures.
- Carry the NHS Lanarkshire identification badge at all times and wear as directed.
- Undertake their voluntary role at agreed times.
- Inform the relevant member of staff if they are unable to attend, in advance if possible.
- Give as much notice as possible if unable to continue their voluntary work.
- Raise any issues of concern relating to their voluntary work with their named contact person. Use the NHS Lanarkshire procedure for Dealing with Volunteer Dissatisfaction if they feel unhappy with the way that they are being treated.
- Raise concerns with their manager about anything that they may have witnessed which is in the public interest and which does

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not relate solely to their own employment. Examples of such concerns could include dangerous working practices which may be a risk to patients or other staff. In circumstances such as these NHS Lanarkshire's Whistleblowing policy might apply, which would afford support and protection to the volunteer in question. NHS Lanarkshire's whistleblowing policy can be accessed via:

<https://www.nhslanarkshire.scot.nhs.uk/download/whistleblowing-policy/>

- Inform their named contact of any relevant changes in their health status or if they are subject to any criminal proceedings during their period of volunteering. This may have an impact on their ability to volunteer with the organisation.
- Inform their named contact in advance of all holidays and breaks.
- Inform the Voluntary Services team of their intention to terminate their volunteering with NHS Lanarkshire and return to the organisation their NHS Lanarkshire Volunteer Identification badge and any other equipment that they may have.

1.6 Development of Volunteering Procedures at a local level

NHS Lanarkshire recognises that individual directorates and localities may need to develop their own protocols for the involvement of volunteers in their particular areas. This should be carried out in conjunction with the Voluntary Services Department and should use the standards laid out in this policy as a minimum baseline standard.



Protocol for NHS Lanarkshire Staff Undertaking Volunteer Roles within the Organisation

Prepared by: Voluntary Services Manager

Lead Executive Director: Director of Human Resources

Approved by: Human Resources Joint Policy Forum
Staff Governance Committee

Previous Version/Date: Version 1 / December 2019

Version Number/Date: Version 2 / December 2023

Revision Date: December 2026

Volunteering Policy

1. Introduction

- 1.1 NHS Lanarkshire is one of the largest employers in Lanarkshire with staff employed in a diverse nature of roles. We recognise that members of staff may wish to exercise their choice to volunteer within the organisation in addition to their substantive posts.
- 1.2 This procedure is intended to provide guidance NHS Lanarkshire staff as to the process that is needed to be undertaken regarding this.

2. Volunteer Roles

- 2.1. This policy and accompanying procedures applies to all existing NHS Lanarkshire who wish to volunteer in one of the volunteer roles which have been agreed in partnership with the NHS Lanarkshire staff side as appropriate roles for volunteers. This is the only circumstance where this policy and procedures are applicable.

3. Volunteer Application

- 3.1. All staff who are wishing to undertake a volunteering role will be expected to complete a Volunteering Registration Form outlining their motivations and expectations in relation to their volunteering application. They will be expected to attend an interview with the Voluntary Services Manager and provide the contact details for 2 character references.
- 3.2. At the interview, they should make it clear to the Voluntary Services Manager that they are existing NHS Lanarkshire staff and it will be established that there is no conflict between the potential role as a volunteer and the individual's substantive role as a member of staff. Should there be a conflict then it is not appropriate for the member of staff to volunteer with NHS Lanarkshire and the Voluntary Services Manager will liaise with neighbouring NHS Boards to see if the member of staff could volunteer with them in a more appropriate role.
- 3.3. If the member of staff is a member of the Registered Workforce with a PVG for their substantive post within NHS Lanarkshire, then there is no requirement to carry out a further PVG or Police Act Disclosure for the volunteering role. However if the member of staff is not currently a member of the Registered Workforce and the Volunteer role that has been identified requires this level of screening then this is undertaken as part of the recruitment process.
- 3.4. Existing members of staff will still need to undergo Occupational Health Screening for the volunteering role.

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- 3.5. Existing staff members are expected to inform their line manager of their application to volunteer with the organisation.
- 3.6. Existing staff members are expected to undertake the NHS Lanarkshire Volunteer induction programme and specific training for the individual volunteer role. However it is expected that they will complete all compulsory / mandatory training as part of their substantive role.

4. The Volunteer / Staff Relationship

- 4.1. Members of staff who are volunteering with the organisation are expected to keep the Voluntary Services Team and designated volunteer contact informed of any work related matters which may affect their volunteering. This would include
 - Sickness absence (including when the health benefit of volunteering is specifically referred to in the fit note)
 - Investigation for disciplinary action
 - Suspension from substantive employment
 - Retiral or resignation from substantive post, even if the intention remains to volunteer within the organisation

These circumstances are not exhaustive and will be reviewed on a regular basis

5. Review of Procedure

- 5.1. This procedure will need to be reviewed in line with the Safer Pre-Employment Check Once for Scotland Policy when it is finalised and then on a 3 yearly basis.