



Volunteering Policy

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Ratifying committee or executive director	Transforming our Culture & Staff Experience Sub Committee	
Date ratified	December 2025	
Next anticipated review	December 2028	
Executive director	Executive Director of Strategy, People & Partnerships	
Policy lead	Senior Workforce Development & Transformation Manager	
Policy author (if different from above)	As above	
Exec Sign off Signature (electronic)		
Disclosable under Freedom of Information Act 2000	Yes	

Policy context

BSMHFT values and recognises the role of volunteering as an essential part of their relationship with the community as well as a means of improving service user experience and promoting mental health wellbeing. The aim of this policy is to define volunteer activity

Policy requirement (see Section 2)

The policy ensures that there is a consistent and robust approach to volunteering across the Trust and that the input they provide is safe and contributes positively to patient care.

Safeguarding is paramount so the policy must be adhered to.

The policy relates to volunteers, and all staff who work alongside, support or supervise volunteers.

Date	Version	Author (Name & Role)	Reasons for review / Changes incorporated	Ratifying Committee
06/11/2024	8	Jade Batchelor Widening Participation & Volunteering Advisor	Review date expired	Transforming our Culture & Staff Experience Sub Committee
05/11/2025	9	Sharon Chinnock Senior Workforce Development & Transformation Manager	Extension date expired	Transforming our Culture & Staff Experience Sub Committee

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1: Introduction:

- 1.1. Rationale** It is important to ensure we engage and manage volunteers in the Trust and coordinate their contribution to enhancing service user care and experience through our Trust values.

Adherence to the policy will ensure a consistent and robust approach to the opportunities, recruitment, induction, training, supervision and support of volunteers.

The policy is in accordance with the NHS pre-employment checking standards, the Lampard Review and complies with the Trust's duty to safeguard vulnerable adults and children. This will enable the Trust to identify and manage risk hence ensure volunteers operate safely and effectively alongside our substantive staff for the benefit of our service users, carers and local community. This policy will support and contribute to the Trust being an Anchor institution by building better links with local communities.

- 1.2. Scope** This policy applies to staff who; offer placements of volunteers, aid or facilitate the recruitment of volunteers, supervise or manage volunteers, operate in a service or team where a volunteer is active and to the volunteers themselves.

It is essential that department managers consult with employed staff to ensure a clear understanding of the Volunteer policy to fulfil the Trust safeguarding responsibilities.

The policy does not cover work experience, student placements, shadowing * **To be removed or service user consultants** who provide ad-hoc 'when required' services (for example, a service user who is part of an interview panel).

There are mechanisms in place for service users who wish to undertake additional tasks whilst they are within the Trust's care; however, this supported participation, or therapeutic activity, this would not constitute a formal volunteer role under this policy.

Where there is a volunteer placement in a service and a current or former service user of that service wishes to undertake the role, due consideration must be given to the nature of and appropriateness of the role, the nature of the service, and the individual. Such occurrences should be considered on a case-by-case basis by the team manager. The final decision will be with the team manager based on the effect it may have on the service and the current service users. There may be times when it is not appropriate for a volunteer to be placed within a service where they currently receive or have previously received treatment. In these circumstances, other placement options will be explored with the individual. The minimum age for volunteers is 18 in clinical areas and 16 in non-clinical areas.

Experts by experience sit completely outside of the Volunteer Policy, sitting under the experts by experience reward and recognition policy.

1.3. Principles (beliefs)

Our values of compassion, inclusion and commitment describe our core ethics and principles. They guide our culture and are underpinned by our everyday behaviours. Trust values – At BSMHFT we all agree to make our three core values real in the way we work together and deliver care. These are to be inclusive, compassionate, and committed. In joining the Trust, we will share a detailed guide to the type of behaviours that we are all expected to follow in making these values real every day. This detailed guide to behaviours is available on posters at our sites and on Connect.



- 1.4. Volunteers can choose to donate their time, energy and discretionary effort for the benefits of others. Therefore, they are well placed to help the Trust provide compassionate caring, putting the patient first, deliver better information and signposting, and supporting cultures of openness and transparency, and must not be compromised or placed at a disadvantage by doing so.

The Trust asks that volunteers recognise that they are representing the Trust and therefore support our commitment to promoting equality through our Trust values. Volunteers must treat others with dignity and respect and not seek to discriminate against others.

The Trust believes that all volunteers have the right to volunteer in an environment which is free from discrimination and promotes fairness and equality in volunteering and volunteer recruitment.

Volunteers provide a supplementary service to users and their carers by choice and no obligation. They should **not** however be involved in direct clinical or personal care, nor give advice or opinions about direct clinical care to service users or carers. They are not employees; their role must be complementary to that of paid staff, and they have a choice whether to volunteer their services or not. They may not be used for job substitution or a method of saving a department staffing costs or form part of the essential staffing structure within our Trust. Volunteers should never be used to temporarily fulfil the roles of paid staff that may be off on leave.

2: The policy All volunteers are required to be appointed through the procedure identified in this policy. No volunteer role should be a replacement for a paid staff opportunity.

Volunteer recruitment is an equal opportunity process and is open to anyone to apply. We welcome applications from members of all communities, service users and non-service users,

carers, staff etc. The Widening Participation & Volunteering Advisor (WPVA) will collaborate with managers, identify volunteer placements and support the recruitment process.

Once a volunteer is engaged, responsibility for their direct supervision and management will rest with the designated line manager known in this policy as the volunteer recruiting manager.

3: The procedure refers to volunteer recruitment process map – appendix 3

3.1 Identifying a Volunteering Role

The WPVA should identify a site volunteer's recruiting manager from each site to develop volunteer profiles and allocate work to volunteers. The Volunteer recruiting manager must contact the WPVA to check the types of tasks and activities they would like the volunteer/s to help with.

To provide further detail about the expected tasks and skills required, the Volunteer recruiting Manager must complete the volunteering role template (Appendix 4) and a Trust risk assessment form. Once completed this must be submitted to the WPVT.

The WPVA will check that this is a suitable volunteering opportunity and will use the information to promote and place suitable volunteers. (See Volunteer recruitment process map) Appendix 3.

Applying for a volunteer opportunity.

The recruitment and advertising of volunteer roles is dependent on requests received for the use of volunteers, roles will be advertised on NHS Jobs /Trac also through rolling recruitment; promotion through the Connects pages, aimed at referrals through families & friends. Volunteers will be required to complete an application form via the NHS jobs/ Trac process. The recruiting manager, supported by WPVA, is responsible for shortlisting, interview questions, and interviews, to evaluate appropriate skills, knowledge, experience, and motivation of the candidates. They will also include an assessment of any additional support or access needs required as part of the recruitment process or to undertake the volunteering opportunity. Volunteers not placed within six months will be asked if they wish to remain on a waiting list should any further opportunities arise. Any volunteers not placed within twelve months will be advised that there are no suitable opportunities, and that any future involvement requires re-registration for example they will need to have further DBS check or may need to re-apply.

Following a successful interview, suitable applicants will undertake The NHS Employment Check Standards.

3.3 Disclosure and Barring (DBS) checks for Volunteer roles

It is important to consider the DBS requirements at the earliest possible stage of role development when creating the role profile. All volunteers need to have a DBS check either enhanced or standard depending on the volunteering role. When a DBS is required, the WPVA will log the DBS number. The DBS reference is only valid for 3 years. (Appendix 3, level 1 volunteer)

The Police Act 1997 (Criminal Records) Regulations 2002 defines a volunteer as:

DBS Standard Checks – Risk assesses the role as to whether it requires infrequent and only occasional patient contact.

Volunteers in roles requiring a Disclosure and Barring (DBS) check will be required to undertake a new check at the appropriate level every 3 years unless they have used the update service. If a volunteers DBS has expired, they must cease volunteering until it has been updated and logged with the Widening Participation & Volunteering Advisor WPVA. The Trust covers the cost of a volunteer DBS check.

Volunteers should not be asked to undertake a roles or tasks alone or unsupervised.

3.4 Training

All volunteers are required to complete 'mandatory fundamental training. Volunteer's information will be sent to the E-Learning team to provide the fundamental training online.

Support will be provided where required. Volunteers with face-to-face service user contact will also be required to undertake additional safeguarding training prior to placement.

3.5 Local Induction

The volunteer recruiting manager must complete, the local induction including security for secure sites. A volunteer handbook is created between the volunteering recruitment manager & WPVA, this information will be updated annually by the WPVA, and the data is kept on a spreadsheet for audit purposes. The Volunteer will appear in the management hierarchy on ESR of the team they are supervised by.

3.6 Starting the Volunteer Role

The Volunteer recruiting manager must complete the local orientation (appendix and introduction to the team as soon as possible and ensure all staff working alongside the volunteer have a clear understanding of their role as agreed in the profile.

The Volunteer recruiting manager should review the role at 8 weeks ensuring that it's suitable for the service and the volunteer. Any issues as part of the review period or otherwise should be addressed directly by the Volunteer recruiting manager and reported to the Trust's WPVA.

3.7 Volunteer Support

The WPVA should enable and develop all staff assigned to supervise volunteers with i.e. coaching, mentoring, Dignity in the workplace, Recovery College courses as appropriate.

All volunteers must receive support and regular supervision/debrief from Volunteer recruiting manager. The level will depend on the role and the experience of the volunteer. All volunteers should have a named person to offer support and guidance, and to resolve any queries. The Volunteer recruiting manager may be different to the team manager, but they must be assigned by the manager and be registered with the WPVA (who should also be notified of any changes). If a volunteer has multiple assignments, they should have a supervisor for each assignment, and any changes notified the WPVA.

It is important that all volunteers are provided with opportunities to give and receive feedback on their roles and on their experience of the organisation. Personal development templates are provided within the volunteer profile (Appendix 4) and should be recorded in the handbook.

3.8 Additional training

Specified volunteer roles may be carried out independently with explicit training, appropriate risk assessments, and supervision debrief (in approved roles). Volunteers and staff must adhere to all relevant policies in order to protect and safeguard the volunteer and service users.

Occasionally a volunteer may be involved in or witness, an event that they find distressing or traumatic and therefore may require support or counselling. In these circumstances the Volunteer recruiting manager or the WPVA can make a referral, or the volunteer can self-refer to the Trust's counselling service provision through Occupational health. See volunteer handbook for details.

3.9 Expenses Claims for Volunteer Trust Wide

Volunteer Responsibilities for Expenses

To ensure a safe and enjoyable experience for all volunteers, please note:

- **Reimbursement Only**

Volunteers may claim actual out-of-pocket expenses incurred while volunteering. These reimbursements are **not subject to tax or National Insurance Contributions (NICs)**, provided they reflect the true cost and do not include any profit.

(Sources: gov.uk, ncvo.org.uk, litrg.org.uk)

- **No Profit or Stipends**

Any payment that exceeds actual expenses or goes beyond HMRC's approved mileage rates will be treated as taxable income. If such payments resemble wages or regular stipends, NICs may also apply.

(Sources: gov.uk, ncvo.org.uk, litrg.org.uk)

The following guidelines for managers, advise on

- **Hours of Volunteering**

Volunteers are encouraged to contribute within a healthy balance. The maximum is **7.5 hours per day** and **20 hours per week**. This includes:

- A mid-morning break
- A lunch break of at least **30 minutes**
- A mid-afternoon break

- **Travel Reimbursement**

We appreciate the time and effort volunteers given, travel costs are to be agreed by the manager prior to travel. Approved travel will be reimbursed upon presentation of tickets or receipts for public transport (including taxis).

- For those volunteering **more than 4.5 hours in a day**, an additional allowance of up to **£4.00** towards lunch can be claimed with receipts.
- Reimbursement will be arranged **at the end of the day** by the local manager via petty cash at the volunteer's base.
- Travel costs will be reimbursed at the **West Midlands travel day-saver rate**.
- Car users can claim mileage at the **NHS reserve rate of 28p per mile** (subject to review in line with Advisory Fuel Rates and NHS policy).

- **Expenses Only**

Volunteers do not receive payment, perks, vouchers, or any other form of currency. Only **reasonable out-of-pocket expenses** are reimbursed with proof of purchase.

Volunteers should kindly **not accept gifts**.

3.10 Health and safety, and insurance

Volunteers are included in the Trust's Health & Safety Policy. Therefore, the Trust will provide volunteers with the information, training and equipment they require to remain safe.

It is important to note that the personal property of volunteers is not covered by any insurance taken out by the Trust.

Volunteers will be covered by the Trust's Employers' Liability insurance policy whilst they are on Trust premises or engaged in any approved volunteering activity off Trust site.

The Trust has both public liability insurance and employer's liability insurance. Public liability insurance covers claims where a third party (such as visitors) are injured whilst on Trust premises or they suffer damage to their property whilst on Trust premises. Employer's liability insurance covers the Trust for any compensation claim if an employee or volunteer is injured or becomes ill because of the work they do for the Trust.

It is the volunteer's own responsibility to ensure that his/her own insurance policy covers use of their own vehicle being used to get to and from their volunteer role.

3.11 Raising a concern

As a member of the public, volunteers may feel the need to raise concerns that would fall under the Freedom to Speak Up: Raising Concerns Policy. Volunteers are protected under the policy. Managers should be aware of this and be prepared to take action if concerns are raised with them in the first place. Volunteers may want to discuss concerns with someone other than their volunteer recruiting manager or Trust staff where they are based.

Speaking up about any concern you have whilst volunteering is important. In fact, it's vital because it will help us to keep improving our services for all patients and the working environment for our staff, see handbook for Freedom to Speak up support.

3.12 Managing a Complaint about Inappropriate Conduct of a Volunteer

Step 1- The Volunteer recruiting manager and the WPVA must promptly assess the seriousness of the complaint and consider if the volunteer needs to stop volunteering immediately and escalate complaint.

Step 2 – The Volunteer recruiting manager and the WPVA need to discuss the complaint with the volunteer. The volunteer will be advised that they can be accompanied by a nominated person in accordance with the complaint /grievance policy at any of these meetings, but not in a legal capacity.

Step 3 - Based on the nature of the complaint and the informal discussion with the volunteer. The Volunteer recruiting manager and the WPVA should agree a course of action. This could be to identify further training and support or put a measure of improvement and review process in place for the individual. A possible outcome is that the volunteer is informed that they can no longer undertake volunteering for the Trust.

The WPVA must refer all safeguarding issues and consider reporting to the Disclosure and Barring Service.

Step 4 -If a volunteer wishes to appeal, they may do in writing to the Trust Chair. The decision of the Trust Chair is final.

3.13 Industrial action

In the event of industrial action by BSMHFT staff, registered volunteers may undertake their usual duties if they wish to do so, providing they are suitably supervised. In the interests of harmonious relations amongst volunteers and paid staff, a volunteer should not be asked to temporarily cover the duties of any paid staff who are taking part in industrial action.

3.15 End of Placement

<https://onbase.bsmht.nhs.uk/OnBaseWebPRD/docpop/docpop.aspx?clienttype=html&docid=121359>

The placement may end by either party. If the opportunity is a specified project term it will automatically end on the agreed date.

If the volunteer chooses to continue in placement, they should contact the WPVA through **bsmhft.volunteering@nhs.net** or ask their volunteer recruiting manager to do so. They should book onto and attend induction for the minimum mandatory annual training update and a re-issue of new trust ID and update.

In order to maintain a robust audit assurance, planning; an accurate recording database is central to track volunteers around the trust. This database is captured on a spreadsheet and kept within the Widening Participation & Volunteering team. The Volunteer recruiting manager must advise the WPVA of the volunteer's leaving date. The WPVA must close the assignment on ESR.

- End of placement set review/end dates
- Dress code – day events via engagement team will supply a volunteer t-shirt. Volunteer attire must be smart/casual no jeans.

3.16 Annual Audit

Support for volunteers is a vital aspect of personal development and recovery. Gathering feedback through audit to capture supervision, identify improvements to recruitment and placements will enable the volunteers and their Volunteer recruiting manager to have more training and more support to perform their role well; and implement the support for volunteers is key to establishing a vital volunteer opportunities within the trust. Annual audits to include the completion of supervision, fundamental training and DBS checks are reported to the Safeguarding Management Board

4: Responsibilities

This should summarise defined responsibilities relevant to the policy.

Post(s)	Responsibilities	Ref
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All Staff	To be aware of the purpose of volunteers to complement the paid workforce, adhere to the policy and notify the policy lead of any concerns. Promote and increase volunteer activity and share good practice.	
Service, Clinical and Corporate Directors	To ensure that managers within their areas adhere to the policy, promote and increase volunteer activity, and develop staff to supervise volunteers	
Policy Lead	Implement the policy and monitor, audit compliance	
Executive Director	Overall responsibility	
Widening Participation & Volunteer Department	<p>Ensuring the volunteer policy is being implemented and up-to-date paperwork and information is readily available for staff</p> <p>Sharing best practice, supporting staff to identify suitable volunteering opportunities including carrying out risk assessments.</p> <p>Approve volunteer opportunities so that they can be promoted through a variety of relevant platforms and partnerships.</p> <p>Undertake regular volunteer inductions ensuring that all volunteers have completed relevant checks and fundamental training and have a signed volunteer agreement.</p> <p>Undertake annual audits on recruitment of volunteers and the management of volunteers and report to Safeguarding Committee to offer assurance in aspect of the Lampard Review.</p> <p>Formally raise concerns and report non-compliance or risk associated with any aspect of volunteer activity or recruitment</p> <p>Monitor and evaluate the effectiveness, safety, and benefit of volunteering and report annually to the Workforce Committee, and the Trust Board for information</p> <p>Gather, analyse and publish equality data information on volunteers annually</p>	
Local Volunteering Supervisors	<p>Adhering to the recruitment process</p> <p>Undertake a risk assessment prior to advertising an opportunity</p> <p>Local orientation and induction including ensuring that the volunteer receives full information about the service/department</p> <p>Reimbursement of expenses</p>	<p>3.2/3</p> <p>3.6</p> <p>3.9</p>

	<p>Identifying additional Recovery College training and ensuring fundamental training is attended and up to date</p> <p>Providing regular communication and feedback to the volunteers regarding their progress</p> <p>Allocating suitable tasks as agreed in profile, all voluntary work is non-clinical.</p> <p>Ensure that the volunteer has a clear understanding of the duties of care and confidentiality attached to working in a healthcare environment and that they have the necessary levels of supervision at all times</p> <p>Delegate supervision responsibility in the absence of the named Volunteer Supervisor</p> <p>Ensure that volunteers undertake fundamental & safeguarding training updates annually.</p> <p>DBS checks (if appropriate to role) every 3yrs.</p> <p>Volunteers should be assigned a named contact person by the manager (if in a different service to their Volunteer Supervisor) of the area they are working in to provide supervision, support and regular reviews. These should be documented and recorded in their personal file.</p> <p>Ensure that all relevant staff are aware of the volunteer's tasks and hours</p> <p>Ensure that appropriate arrangements are in place to identify the whereabouts of volunteers whilst on Trust business.</p> <p>Appropriately deal with any problems which may arise including the reporting of any accidents or incidents in accordance to Trust protocol</p> <p>Ensuring that their volunteers' details are registered correctly with the (WPVA) and on the Trust's volunteer management system (ESR NHS Electronic Staff Record)</p> <p>Providing feedback to the Widening Participation & Volunteer department for regular audit and monitoring of volunteer activity (Appendix 9)</p>	<p>3.7</p> <p>3.4</p> <p>3.3</p> <p>3.10</p> <p>3.11</p> <p>3.12</p> <p>3.14</p>
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		3.17
Volunteers	<p>Only undertake their voluntary work at times and locations agreed with their volunteer recruiting manager</p> <p>Informing their supervisor or named contact in as far advance as possible if they are unable to attend</p> <p>Participate in all specified training and inductions and update sessions with their volunteer recruiting manager decides is relevant and necessary to their role</p> <p>Informing their volunteer recruiting manager and WPVA of any changes to their health or criminal status</p> <p>Raise any issues of concern relating to their voluntary work with their supervisor</p> <p>Updating their details on Trust's volunteer management system with the support of their Volunteer Supervisor so that information is up to date and accurate</p> <p>Informing the Volunteer Supervisor when they wish to end their volunteer role and return all passes and any Trust belongings</p> <p>Undertake a DBS check, at the appropriate level every three years.</p> <p>Adhere to the policy and notify the policy lead of any concerns</p>	App1

5: Development and Consultation process consisting of:

An outline of who has been involved in developing the policy and procedure including Trust forums and service user and carer groups.

Consultation summary	
Date policy issued for consultation	November 2024
Number of versions produced for consultation	1
Committees / meetings where policy formally discussed	Date(s)

Where received	Summary of feedback	Actions / Response

6: Reference documents

Employment & Engagement of Service Users Policy

Equality Inclusion and Human Rights Policy

Health & Safety Policy

Induction and Fundamental Training Policy

Incident Reporting Policy

Information Governance Assurance Policy

Lone Working Policy

Freedom to Speak up (raising a concern) Policy

Work experience Policy

Grievance and Dispute Policy

Experience reward and recognition policy

Counter Fraud and Anti-Bribery

Adult and Children's Safeguarding Policies

<https://onbase.bsmht.nhs.uk/OnBaseWebPRD/FolderPop/FolderPop.aspx?ID=133250&clienttype=html>

The Kings Fund Volunteering in health and care. Securing a sustainable future. 2013

<http://www.tuc.org.uk/workplace-issues/volunteering>

<https://www.gov.uk/volunteering/volunteers-rights>

www.nhsemployers.org

<https://www.england.nhs.uk/get-involved/get-involved/volunteering/>

8: Glossary consisting of:

Volunteer recruiting manager- the designated member of staff supervising the volunteer

ESR - Electronic Staff Record

WPVA-Widening participation and volunteer advisor

DBS-Disclosure and barring service

TRAC- system used to advertise vacancies

9: Audit and assurance consisting of: WPV Team to adhere to Trust processes, monitoring data, to include residency, race, age & ethnicity, captured via ECLIPSE.

What steps will be undertaken to assess how well the policy is working

Element to be monitored	Lead	Tool	Frequency	Reporting Committee
Volunteers will be representative of the community and the Trust; it serves and reaches out to.	WPVA	External partnerships and Events Audit and recruitment practice.	annually	People & Culture meeting
Volunteers have undergone the appropriate NHS Employment checks including DBS	WPVA	Revised recruitment & TRAC process,	annually	Workforce Initiatives Group Shaping future workforce meeting Annual audit data to be shared via Safeguarding Management board for assurance; mandatory training via ESR, DBS checks.
Fundamental training Face to face and online take-up of training	Core Fundamental and professional training manager	Face to face training option as well as online training to improve recruitment and development of Volunteers	annually	Shaping future workforce meeting
New Volunteer roles require monitoring and additional training to maintain development suitability and safety	WPVA	Centralised recruitment process and advertising	On-going	Workforce Initiatives Group Shaping future workforce meeting
All Volunteer Supervisors will coach and or	WPVA Core Fundamental	Coaching and mentoring training for SM supervisors	On-going	Shaping future workforce meeting

mentor volunteers	and professional training manager			
Volunteers Supervision	WPVA Volunteer Supervisors	Regular supervision every 8 weeks. Volunteer's concerns can be reported directly to the WPVA	On-going	Local team meeting Shaping future workforce meeting

10. Appendices consisting of:

1. Equality Impact Assessment
2. DBS level 1
3. Volunteer recruitment process map
4. Volunteer profile builder
5. Volunteer expenses forms
6. Volunteer risk assessment template

Advice can be obtained from the central team at any stage by calling 07985 882207 or emailing bsmhft.volunteering@nhs.net

Appendix 1

Equality Analysis Screening Form

word version of this document can be found on the HR support pages on Connect
<http://connect/corporate/humanresources/managementsupport/Pages/default.aspx>

Title of Proposal	Volunteer policy		
Person Completing this proposal	Jade Batchelor	Role or title	WPV Advisor
Division	Corporate	Service Area	Learning & Development
Date Started	19 Nov 2025	Date completed	19 Nov 2025
Main purpose and aims of the proposal and how it fits in with the wider strategic aims and objectives of the organisation.			
Managers at all levels across the Trust should be able to design, build and increase volunteer opportunities, creating and sustain ongoing volunteer development			
Who will benefit from the proposal?			
Interested parties from all communities should be able to access a wide range of opportunities to volunteer			
Do the proposals affect service users, employees or the wider community? <i>Add any data you have on the groups affected split by Protected characteristic in the boxes below. Highlight how you have used the data to reduce any noted inequalities going forward</i>			
Employee, service user and wider community impact			
Do the proposals significantly affect service delivery, business processes or policy? <i>How will these reduce inequality?</i>			
Yes, in a positive way as this can support service delivery and potential areas of inequalities.			
Does it involve a significant commitment of resources?			

How will these reduce inequality?				
Recruiting manager resources, vacancy available to wider community to apply for.				
Do the proposals relate to an area where there are known inequalities? (e.g. seclusion, accessibility, recruitment & progression)				
Recruitment				
Impacts on different Personal Protected Characteristics – Helpful Questions:				
<i>Does this proposal promote equality of opportunity?</i> <i>Eliminate discrimination?</i> <i>Eliminate harassment?</i> <i>Eliminate victimisation?</i>			<i>Promote good community relations?</i> <i>Promote positive attitudes towards disabled people?</i> <i>Consider more favourable treatment of disabled people?</i> <i>Promote involvement and consultation?</i> <i>Protect and promote human rights?</i>	
Please click in the relevant impact box or leave blank if you feel there is no particular impact.				
Personal Protected Characteristic	No/Minimum Impact	Negative Impact	Positive Impact	Please list details or evidence of why there might be a positive, negative or no impact on protected characteristics.
Age	x			It is anticipated that age will not have a negative impact in terms of discrimination as this policy ensures that all volunteers should be treated in a fair, reasonable and consistent manner irrespective of their age.
Including children and people over 65 Is it easy for someone of any age to find out about your service or access your proposal? Are you able to justify the legal or lawful reasons when your service excludes certain age groups				
Disability		x		It is anticipated that disability will not have a negative impact in terms of discrimination as this policy ensures that all volunteers should be treated in a fair, reasonable and consistent manner irrespective of their disability. This is dependent if the individual feel comfortable about being open about their disability especially where

				this may be a hidden disability or mental health issues. The current WDES is showing the Trust is ranked in the top 10% nationally in Recruitment and Reporting of harassment, bullying and abuse.
Including those with physical or sensory impairments, those with learning disabilities and those with mental health issues Do you currently monitor who has a disability so that you know how well your service is being used by people with a disability? Are you making reasonable adjustment to meet the needs of the staff, service users, carers and families?				
Gender	x			It is anticipated that gender will not have a negative impact in terms of discrimination as this policy ensures that all volunteers should be treated in a fair, reasonable and consistent manner irrespective of their gender.
This can include male and female or someone who has completed the gender reassignment process from one sex to another Do you have flexible working arrangements for either sex? Is it easier for either men or women to access your proposal?				
Marriage or Civil Partnerships	x			It is anticipated that marriage or civil partnerships will not have a negative impact in terms of discrimination as this policy ensures that all volunteers should be treated in a fair, reasonable and consistent manner irrespective of their marriage or civil partnerships.
People who are in a Civil Partnerships must be treated equally to married couples on a wide range of legal matters Are the documents and information provided for your service reflecting the appropriate terminology for marriage and civil partnerships?				
Pregnancy or Maternity	x			It is anticipated that pregnancy and maternity will not have a negative impact in terms of discrimination as this policy ensures that all volunteers should be treated in a fair, reasonable and consistent manner irrespective of this. However, the Trust will provide necessary support and reasonable adjustment for an employee who is pregnant or on maternity, paternity or adoption leave and this may be pausing the procedure for a temporary time. This is dependent

				on staff feeling comfortable about being open about their or their partners pregnancy, including miscarriage.
This includes women having a baby and women just after they have had a baby Does your service accommodate the needs of expectant and post natal mothers both as staff and service users? Can your service treat staff and patients with dignity and respect relation in to pregnancy and maternity?				
Race or Ethnicity	x			It is anticipated that race or ethnicity will not have a negative impact in terms of discrimination as this policy ensures that all volunteers should be treated in a fair, reasonable and consistent manner irrespective of their race or ethnicity.
Including Gypsy or Roma people, Irish people, those of mixed heritage, asylum seekers and refugees What training does staff have to respond to the cultural needs of different ethnic groups? What arrangements are in place to communicate with people who do not have English as a first language?				
Religion or Belief	x			It is anticipated that religion or belief will not have a negative impact in terms of discrimination as this policy ensures that all volunteers should be treated in a fair, reasonable and consistent manner irrespective of their religion or belief.
Including humanists and non-believers Is there easy access to a prayer or quiet room to your service delivery area? When organising events – Do you take necessary steps to make sure that spiritual requirements are met?				
Sexual Orientation	x			It is anticipated that sexual orientation will not have a negative impact in terms of discrimination as this policy ensures that all volunteers should be treated in a fair, reasonable and consistent manner irrespective of their sexual orientation.
Including gay men, lesbians and bisexual people Does your service use visual images that could be people from any background or are the images mainly heterosexual couples? Does staff in your workplace feel comfortable about being 'out' or would office culture make them feel this might not be a good idea?				
Transgender or Gender Reassignment	x			It is anticipated that being transgender or having gender reassignment will not have a negative impact in terms of discrimination as this policy ensures that all volunteers should be

				<p>treated in a fair, reasonable and consistent manner irrespective of them being transgender or having gender reassignment.</p>
<p>This will include people who are in the process of or in a care pathway changing from one gender to another</p> <p>Have you considered the possible needs of transgender staff and service users in the development of your proposal or service?</p>				
<p>Human Rights</p>	<p>x</p>			<p>This policy is written to promote equality and remove any discrimination to ensure that everyone can fulfil their full potential within a Trust that is inclusive, compassionate, and committed. This is keeping in line with our Trust values, the NHS People's Plan commitment to equality, diversity and inclusion and reflects the provisions of the Equality Act 2010.</p> <p>This policy applies to all, including applicants applying for a job, staff including agency, bank and volunteers, services users and carers, visitors, stakeholders, an any other third-party organisations who work in partnership with the Trust</p>
<p>Affecting someone's right to Life, Dignity and Respect?</p> <p>Caring for other people or protecting them from danger?</p> <p>The detention of an individual inadvertently or placing someone in a humiliating situation or position?</p>				
<p>If a negative or disproportionate impact has been identified in any of the key areas would this difference be illegal / unlawful? I.e. Would it be discriminatory under anti-discrimination legislation. (The Equality Act 2010, Human Rights Act 1998)</p>				
	Yes	No		
<p>What do you consider the level of negative impact to be?</p>	High Impact	Medium Impact	Low Impact	No Impact
			x	
<p>If the impact could be discriminatory in law, please contact the Equality and Diversity Lead immediately to determine the next course of action. If the negative impact is high a Full Equality Analysis will be required.</p>				

If you are unsure how to answer the above questions, or if you have assessed the impact as medium, please seek further guidance from the **Equality and Diversity Lead** before proceeding.

If the proposal does not have a negative impact or the impact is considered low, reasonable or justifiable, then please complete the rest of the form below with any required redial actions, and forward to the **Equality and Diversity Lead**.

Action Planning:

How could you minimise or remove any negative impact identified even if this is of low significance?

- Volunteer advertising and events will be shared with partner organisations and to increase the reach and scope applying for roles, and endeavour to be reflective of the wider community
- Volunteer recruiting managers will be specifically given coaching, training, Dignity in the workplace and boundary training.
- Hearing impaired volunteers can have difficulty accessing our or eLearning or induction. Interpreters should be booked when necessary. Costing should be allowed for this
- Face to Face Training for Fundamental training will be offered and interpreters can be arranged when necessary

How will any impact or planned actions be monitored and reviewed?

Volunteer Audit

How will you promote equal opportunity and advance equality by sharing good practice to have a positive impact other people as a result of their personal protected characteristic.

Communications plan and trust wide promotion in ways accessible to ALL staff without the reliance upon electronic communications

Please save and keep one copy and then send a copy with a copy of the proposal to the Senior Equality and Diversity Lead at bsmhft.hr@nhs.net . The results will then be published on the Trust's website. Please ensure that any resulting actions are incorporated into Divisional or Service planning and monitored on a regular basis

Appendix 2

Level 1 volunteer

Criteria for this level of volunteer role;

- Volunteer role under constant supervised, never with SU alone
- Will not be in clinical inpatient ward areas
- No more than 20 hours a week for no more than 12 months
- DBS
- Occupational health screen – health conditions fit to do your job
- Develop a specific form - volunteer form – this will ensure that volunteers are safe in our environments
- Are you able to fulfil the role outlined in the volunteer briefing
- Are there adjustments needed
- Discuss with manager - can these be agreed
- Manager refers to occupational health if required.
- E learning – statutory i.e. fire, manual handling, supported in face to face in cohort induction
- Volunteer agreement, issued by recruitment.
- References -

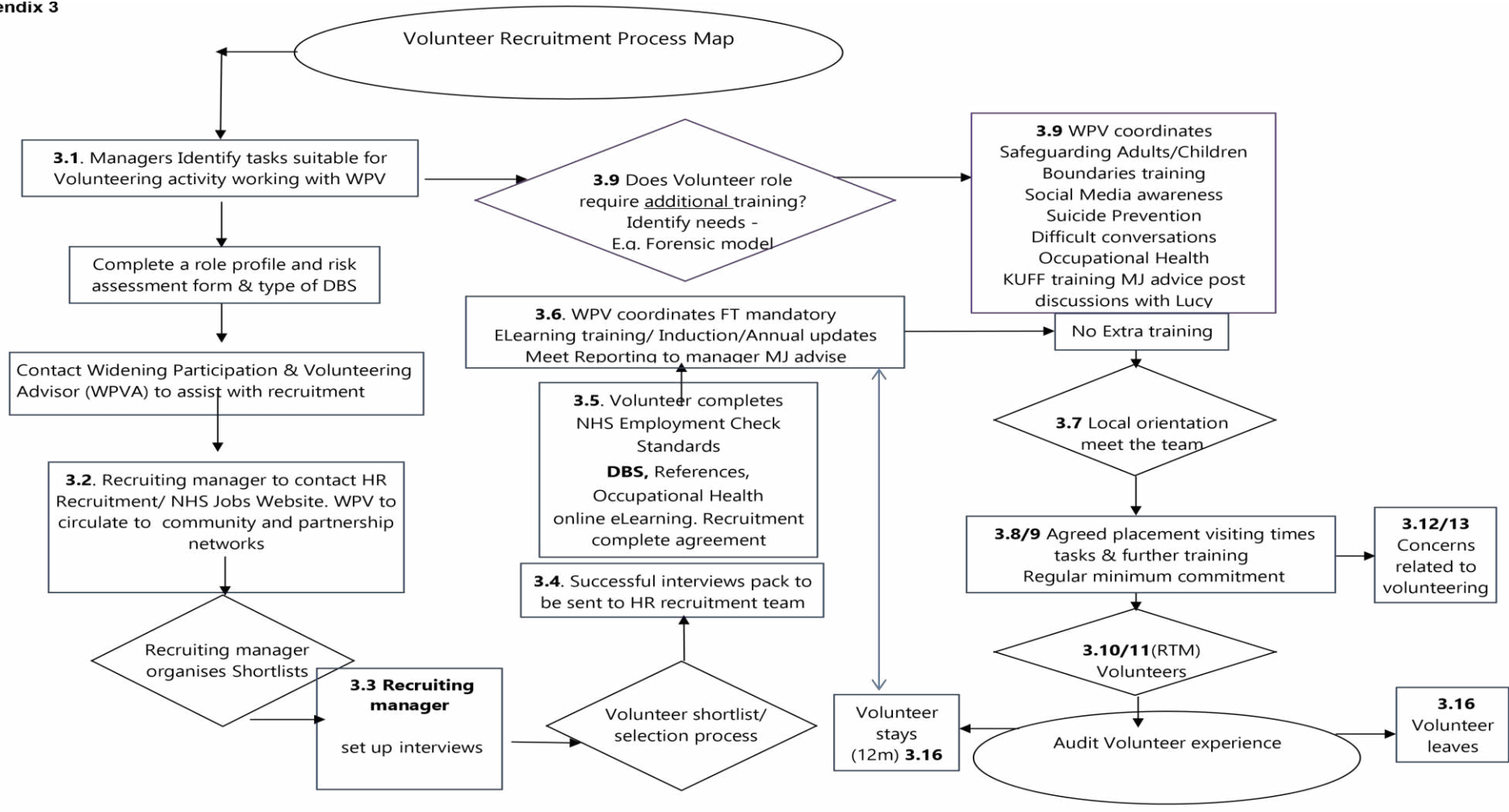
Volunteer policy to be adapted to include this level of volunteer role, to include flow chart and volunteer induction available for all

Agreed also to review the next level volunteer roles.

Look at other existing roles.

Appendix 3 Volunteer recruitment process map

Appendix 3



Appendix 4

Volunteer Profile

Role Title	
Department / Service	
Supervisor Name and Role	
Location	
Time Commitment per week	

Role Description	
Outline Key Tasks	
Skills/experience required to support the role:	
Our values and behaviours	Our values; compassionate, inclusive and committed guide how we treat ourselves, one another, our service users, families and carers, and our partner organisations. Our everyday behaviour guide sets out what this looks like in practice. We have attached this for your reference.
Risk Assessment Carried Out By?	Name:

Role Profile Completed By	
Date	

DBS Status (Please select where appropriate)	
Enhanced DBS / Working with SUs	
Standard DBS / Indirect contact with SUs	
No DBS / No contact with service users	

Volunteer Signature		Date	
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Personal Development Planning

BSMHFT is a proactive and progressive employer. Our goal is to create a variety of pathways to careers in the NHS. The strength of our staff is in our shared values. This starts with a personal commitment. Our work experience, volunteers, apprentice programmes create opportunities to seek personal and professional growth and to give evidence of this in your placement and training.

Our Values	Compassionate	Inclusive	Committed
<p>Supporting statements</p> <p>These statements expand on the values to broaden their meaning.</p>	<ul style="list-style-type: none"> Supporting recovery for all and maintaining hope for the future Being kind to ourselves and others Showing empathy for others and appreciating vulnerability in each of us 	<ul style="list-style-type: none"> Treating people fairly, with dignity and respect Challenging all forms of discrimination Valuing all voices so we all feel we belong 	<ul style="list-style-type: none"> Striving to deliver the best work and keeping service users at the heartB3 Taking responsibility for our work and doing what we say we will Courage to question to help us learn, improve and grow together
<p>5 Core Behaviors</p> <p>The behaviors describe what our values look like in practice, i.e. it's how we demonstrate our values.</p> <p>These are the top 5 core behaviors for each of our values.</p>	<ol style="list-style-type: none"> Use strategies to manage my emotions to avoid creating a negative atmosphere Offer forgiveness and do not judge others or myself harshly when we get things wrong Notice when someone is struggling and offers help Focus on finding a solution and do not blame the person responsible Look for, and praise, the achievements and contributions of other people 	<ol style="list-style-type: none"> Treat everyone with respect irrespective of their perceived difference (i.e. beliefs, background, characteristics, culture, role or circumstance) Respect other people's personal space, privacy and dignity Privately and sensitively challenge my own behaviors or those demonstrated by others, that are not in line with our values Involve others to develop a shared understanding of what needs to change Proactively and willingly share relevant information with others 	<ol style="list-style-type: none"> Proactively identify what needs to happen to get the job done Own up to my mistakes without delay, apologies and take responsibility for putting them right Share my concerns with appropriate people to find a resolution Balance service user (or internal customer) needs with resources available when making decisions Check to ensure service users (or internal customers) are happy with the service received
<p>Leadership Behaviors</p> <p>These are for our people leaders in addition to the</p>	<ol style="list-style-type: none"> Enable people to work in a way that balances BSMHFT's objectives and suits 	<ol style="list-style-type: none"> Include those affected when creating plans Coach people to identify issues and create their own 	<ol style="list-style-type: none"> Build a strategy that is clearly aligned with anticipated future service user needs

core behaviors above.	<p>them as an individual.</p> <ol style="list-style-type: none"> Put people's wellbeing and needs ahead of my goals. Check in regularly with direct reports, to ask how things are and to offer support 	<p>solution without imposing my own ideas</p> <ol style="list-style-type: none"> Ensure people have the required training, knowledge, skills, time and space to do their work comfortably and safely 	<ol style="list-style-type: none"> Find opportunities for people to use and develop their strengths Seek regular feedback on my leadership style and adjust to suit my people
<p>Negative Impact Behaviors</p> <p>These behaviors describe things that often have a negative impact on others and therefore, are what we don't want to see or experience.</p>	<p>Non-compassionate behaviors</p> <ul style="list-style-type: none"> ➤ Not listening to others ➤ Failing to realise and accept or ignore the negative impact of your behavior on others. ➤ Using force, coercion or power to bully or impose 	<p>Non-inclusive behaviors</p> <ul style="list-style-type: none"> ➤ Dismissing other people's experiences or views, as untrue or unimportant ➤ Being rude, using inappropriate banter or making discriminatory/derisory comments about others ➤ Pretending other people's work was done by you and taking credit for it. 	<p>Non-committed behaviors</p> <ul style="list-style-type: none"> ➤ Ignoring issues, saying they are somebody else's problem ➤ Dismissing feedback about service users or staff care ➤ Not involving service users and their families in care and service decisions.

Appendix 5

1. CLAIM FOR VOLUNTEER EXPENSES

Reimbursement of expenses will be arranged at the end of the day's work by the local manager through petty cash at the volunteer's base. Reimbursement of expenses for travel costs will be paid (£4:60) at the Regional Day saver rate. For volunteers working for more than 4.5 hours in one day, an additional amount will be allowed, as reimbursement of expenses towards lunch (£4.00). In services where meals are available, a meal can be provided. Any alternative travel arrangements will need to be negotiated through the Volunteer Supervisor.

Any materials that a volunteer is asked to purchase in order to undertake their role should be agreed by the budget holder and the Volunteer Supervisor. *

Bus/Train Fare (max £4:60)	£
Car miles _____ @28 pence per mile (NHS Reserve rate)	£
Parking	£
Meals / Snacks / Refreshments max £4:00	£
* Reimbursement of out-of-pocket expenses relating to role, receipt required. Prior agreement from budget holder and Volunteer recruiting manager required.	£
Total Claim	£

The above is a true record of my out-of-pocket expenses for participation as a volunteer for Birmingham and Solihull Mental Health NHS Foundation Trust

Name (Block Capitals) _____

Signed _____ Date _____

Authorised by Budget holder (to be reimbursed through petty cash)

Name (Block Capitals) _____

Signed _____ Date _____

Account Code _____

The Volunteer recruiting manager will submit the dated forms to be authorised by Budget holder within the team (to be reimbursed through petty cash). In the event there is no local petty cash account to arrange to return on a subsequent day to complete.



1. Definition

Volunteers provide supplementary service to service users and their carers but cannot be involved in their direct clinical care. Your role is complementary to that of paid staff. You will not be used as an employee, or form part of the essential staffing structure within our Trust.

2. Responsible Manager – Volunteer recruiting manager

For this placement you will be directly responsible to (Name and contact number of Volunteer Supervisor);

should you not be able to contact your manager, then you should contact a nominated member of staff based where your role takes place on:

3. Flexible Tasks

Your tasks are described in the role description you have already received. These may be changed, after discussion with you, to meet the needs of the department. The Trust reserves the right to review your involvement and move you to other placements within the organisation, as long as you agree. Regrettably, if an agreement cannot be reached which suits both the Trust and the volunteer, then the placement will be ended and other options discussed.

4. Hours of Voluntary Service

Your hours will be discussed and agreed with you and your volunteer recruiting manager. We will try to help arrange hours that suit you and the service you volunteer with.

5. Attendance

If you are unable to attend as agreed for any reason, please notify your volunteer recruiting manager as soon as possible. Please note an absence of 12 weeks may result in the ending of your volunteer assignment.

6. Health Clearance

We will arrange for you to undergo health clearance before you begin to ensure you are fit to carry out the activities involved. This will involve you completing a health questionnaire and may be followed by a health interview with a member of staff from the Occupational Health Department. You may access the OH provider directly for assistance if necessary

7. Confidentiality and Data Protection



Your attention is drawn to the confidential nature of information collected within the Trust. You should not divulge any patient or other information as a result of your placement with the Trust, to anyone not authorised to receive it. This includes holding discussions with members of Trust staff concerning patients in situations where the conversation may be overheard. This high level of confidentiality continues indeterminately. Matters concerning staff and details of items under consideration by the Trust are also included in this clause. In the case of computerised information, breach of confidentiality could result in a prosecution for an offence or action for civil damages under the Data Protection Act 1998. **Volunteers must also sign and keep a copy of the Trust's 3rd Party Confidentiality Agreement.** This agreement describes the responsibilities of external parties under the NHS Confidentiality Code of Practice 2003 and the Data Protection Act 1998 when undertaking tasks for/ within Birmingham and Solihull Mental Health NHS Foundation Trust (BSMHFT).

8. Social Media and Boundaries

You must not post photographs of yourself, your colleagues, with resident service users, carers or visitors within the Trust or at Trust locations at any time. Volunteers must safeguard themselves and other volunteers, staff, service users and carers by discouraging any contact between resident service users outside of the capacity to which they fulfil the Volunteer role (including interaction via social media) to promote safety, confidentiality and ensure that professional boundaries are in place. Professional codes of conduct must be recognised and respected.

9. Criminal Offences

You are required to inform the Trust of any custodial or non-custodial conviction, criminal record, investigation, charges, caution or other relevant action including any investigation that has occurred before your placement with the Trust. The Trust retains the right to end your placement if it is felt that this will have impact on or effect the position you hold and /or duties that you carry out.

If you do not disclose such information, the Trust may end your placement without notice.

10. Security Arrangements

You must always wear your name/security badge whilst on Trust property. Your reporting to manager will make arrangements for you to have a badge and inform you about any other security arrangements. The name/security badge must be returned to your Volunteer Supervisor at the end of your placement.

11. Acceptance of Gifts

You must not accept any gifts of consideration as an inducement or reward for:

- Doing, or refraining from doing, anything in your volunteering capacity **or**
- Showing favour or disfavour to any person in your capacity as a volunteer



Any money, gift or consideration received by you whilst at Birmingham & Solihull Mental NHS Foundation Trust, from a person or organisation holding or seeking to obtain a contract, may result in the end of this placement. It will also be deemed by the fraud team to have been received corruptly unless you are able to prove the contrary.

12. Personal Property

The Trust does not accept responsibility for loss or damage to personal property belonging to you. You should, therefore, consider obtaining adequate insurance cover for any personal items of value.

13. Risk Management

You must take reasonable care and responsibility for your own health and safety and for that of other persons who may be affected by your own actions or omissions for the period of your placement with the Trust. For further information and details of health and safety rules, you are referred to the local Risk Management and Health and Safety Policies available from your department. You must not undertake any tasks, e.g. manual handling, for which you have not received any training.

14. Policies and Procedures

You will need to observe the following:

- Equality Human Rights and Inclusion Opportunities Policy
- Dignity at Work Policy
- Raising a Concern (Whistleblowing) Policy
- Health and Safety Policy
- Risk Management Policy
- Incident Reporting Policy
- Information Governance Assurance Policy
- All other relevant Trust policies and procedures

All the above are available for you to see on the intranet. Training can be arranged, and your Volunteer Supervisor will help you to understand the relevant sections. The main requirement is to be aware that these policies exist, and to always seek support if necessary.

15. Acceptance and Understanding of the Terms of Reference for Volunteers



Please sign of copy this Volunteer Agreement to acknowledge your acceptance and understanding of its terms. Your Volunteer Supervisor should take a copy of the signed agreement to keep on your file, please keep this copy for your own reference.

The Volunteer Agreement is not a binding agreement and there is no obligation on either party to maintain the arrangement. Either party can conclude this placement without formality.

If at any time during the period of this placement, your conduct and/or performance prove unacceptable, the Trust reserves the right to end this placement, as it deems necessary, without notice.

PRINT NAME _____

SIGNATURE _____ DATE _____
Volunteer Supervisor



Appendix 6

Local Placement Induction Checklist for Volunteers

Name of Volunteer	Volunteer recruiting manager	Department	Date Commenced

This record is to be completed by Volunteer recruiting manager in presence of the volunteer. It is to be completed on the first day of attendance in Team/ Directorate/Department.

Introduction	Date information given	Information given by (signature)	Information received by volunteer
Introduction to area of work, team, ward, dept. service – tour of Area			
Introduction to colleagues/patients (if applicable)			
Given clear instructions on whom to report to Volunteer recruiting manager or (Volunteer buddy)			
Shown lockers/security of belongings explained			
Been acquainted with location of dining facilities, coffee machine/kettle, library – (where available).			
Check role profile and -introduce to the tasks/to be undertaken			



Health & safety	Date information given	Information given by (signature)	Information received by volunteer
Location and fire-fighting equipment (legal requirement although volunteers not expected to use or be responsible for evacuating service users etc.)			
What to do in case of Fire drills and alarms & location of Fire Exits/Assembly points			
Health risks – COSHH			
Reporting incidents			
First Aid boxes/first aiders/incident forms			
Security measures – doors and alarm codes (e.g. pinpoint alarms)			
Information	Date information given	Information given by (signature)	Information received by volunteer
Signing in/out procedures			
Mealtimes and arrangements/volunteer meals			
Code of dress			
Whom to approach for help/information			
Importance of checking in at a regular time keeping/attendance			
Policies and where they can be found			
Issued with any supplementary checklists			
Expected standards of procedure confidentiality and boundaries	Date information given	Information given by (signature)	Information received by volunteer
Politeness to service users, carers and visitors			
Communication, boundaries, social media contact			



Car parking			
Volunteers raising concerns flowchart			
Received information on: (if applicable)	Date information given	Information given by (signature)	Information received by volunteer
Team or Department rules			
Identifying Training Needs			
Ward/department/service routines			
Goal setting,			
Understanding the trust, communications brief, notice boards, Trust website,			
Departmental meetings			

A copy should be kept with the volunteer handbook, and a copy should be scanned and emailed to the Widening Participation & Volunteering Advisor (WPVA). **BSMHFT.Volunteering@nhs.net** within the department

I acknowledge receipt of this document and will keep a personal copy for my own reference.

PRINT NAME _____

SIGNATURE _____ DATE _____

Volunteer



Appendix 7.

Environmental Risk Assessment

There is a list of potential hazards listed below. Please use these as appropriate to populate the risk assessment. This is not a definitive list therefore if there are other hazards that you identify in your working environment that are not listed please ensure that these are included. Equally not all listed hazards might be applicable to your working environment, so there is no requirement to include in your assessment.

Reference Number		Type of service	
Assessor(s)		Date Completed	
Service Manager		Review Date	

Activity	Hazard and Harm	Key persons at risk	Existing Controls
			<ul style="list-style-type: none">



Activity	Hazard and Harm	Key persons at risk	Existing Controls
			•
			•
			•
			•
			•
			•
			•



Activity	Hazard and Harm	Key persons at risk	Existing Controls
			<ul style="list-style-type: none">
			<ul style="list-style-type: none">
			<ul style="list-style-type: none">



List of Potential Hazards

- Access and Egress
- Asbestos
- Barricade
- Biological Hazards
- Bomb Threats/ Suspicious Packages
- Chemical Hazards
- Confined Spaces
- Display Screen Equipment
- Driving/ Vehicle Safety
- Electricity
- Environment Factors e.g. noise, lighting, ventilation
- Equipment
- Fire Safety
- First Aid
- Food Hygiene
- Infection Control – inc Covid-19
- Infectious Diseases/ Needle sticks/ Sharps
- Interviewing Service Users
- Legionella
- Ligature
- Lone Working
- Moving and Handling
- New and Expectant Mothers
- Patient/ SU/ Visitor Vulnerability
- Security
- Slips/ Trips/ Falls
- Violence and Aggression/ Assault
- Work Related Stress
- Working at Height
- Young or Inexperienced Person

This record is to be completed by Volunteer recruiting manager in presence of the volunteer. It is to be completed on the first day of attendance in Team/ Directorate/Department.

Please forward a copy of this Workplace Risk Assessment Record to Risk & Safety and Service Manager