

# Volunteering pack

Volunteer induction  
and training



# Introduction

This chapter looks at the importance of volunteer inductions, how training can increase commitment, and help to ensure your volunteers are working effectively in your organisation. It outlines the information to include in a volunteer agreement and provides a sample of an induction pack and checklist for your organisation to adapt.

## Purpose of inductions

Inductions are an important opportunity to introduce volunteers to the organisation, communicate relevant policies and procedures and set out both what is expected of them and what they can expect in their new role.

All volunteers should have an induction and training programme appropriate to the role they will undertake. For short-term or one-off projects this may be quite short. For volunteers with regular commitments it should fully prepare them for their role operating in a healthcare setting.

## Induction programmes

The methods for delivering induction will vary according to different trust policies. Group inductions can take less time and encourage wide-ranging discussions. They can also enable volunteers to start to build relationships and support systems.

Individual induction can be more role specific, fit in better with the volunteer's other commitments and can be adapted for volunteers who require a lot of support.

## Induction packs and checklist

An induction booklet or pack can provide a useful reference guide and training log for volunteers, who will have a lot of information to absorb. It is good practice to include a checklist and training record, which can be kept and signed off as appropriate.

An induction pack might include:

- an introduction to the organisation
- what their role will be
- staff they need to know
- guidelines for working alongside staff
- general information, tea points, toilets, car parks, bus stops and so on
- expenses procedures and sample form
- wheelchairs and trolleys – appropriate use of and where to find them

- first aid points
- training – manual handling, health and safety and fire procedure are mandatory
- infection control training/information
- occupational health
- confidentiality
- raising concerns
- insurance
- volunteer agreement
- problem-solving procedures.

A sample induction pack and checklist is available in Annex 1. The topics covered in the sample are not exhaustive and should be adjusted to take account of local circumstances.

### What to do if things don't work out

Induction may be the stage at which a person realises that the volunteering opportunity to which they have been recruited is not for them.

If this is the case it will prove useful for future recruitment and induction to discuss their reasons for withdrawing, and also whether there is anything in the recruitment or induction process that could be improved.

# Volunteer agreements, policies and procedures

When engaging a volunteer it is important that they have a written agreement – but not a contract, which could be construed as indicating an employment relationship in the eyes of the law. Care should be taken to avoid creating circumstances that imply an employment relationship. While volunteers should be afforded the same respect and care as employees, it should be clear that the organisation has a different, non-contractual relationship with them.

Volunteers should be included in organisation-wide policies such as health and safety, but policies which deal with equal opportunities, grievances, or disciplinary matters should be distinct from those for paid staff.

Ideally the trust policy and agreement should be partner documents, which complement each other, the agreement defining what the volunteer can expect from the organisation and what is expected in return, with no intention to create a contractual relationship between the trust and volunteer. The policy demonstrates the organisation's commitment to its volunteer programmes, its individual volunteers, patients, service users and staff. It particularly relates to recruitment, health and safety, confidentiality, privacy and dignity and equality and diversity.

Outline what you the organisation will do in terms of:

- training
- induction
- providing support, a supervisor, manager and so on
- reimbursement of expenses
- insurance
- health and safety
- diversity
- problem solving

Outline what you expect from them:

- their role within the organisation
- adherence to the organisation's policies and procedures
- confidentiality
- standards of behaviour, diversity, punctuality, dress codes
- provision of information in terms of CRB

Sample agreements can be found on the Volunteering England **website**.

# Training

Ensuring that volunteers have the correct training for the particular role is essential for the success of any volunteer programme. In some instances this is a mandatory requirement to ensure public and personal safety (for example, health and safety, fire and manual handling).

NHS organisations should set a training budget for volunteers to guarantee that volunteer training and development can be properly resourced. Training should be relevant to the role being undertaken by the volunteer. The style and content of the training will depend on the tasks the volunteer has to perform, and what skills and competencies they already have. It may be formal, such as food handling and hygiene, or informal, such as coaching from a more experienced volunteer. Refresher training to keep volunteers up to date with current and new skills may also be required.

On-the-job training, using a buddy system, is often the most cost effective, but really only works well for one or two trainees at a time. This method is only appropriate and effective if the person doing the training is confident, thoroughly understands their role, is a good communicator, and if the volunteer feels that they can ask questions. A crib sheet or written notes are a useful resource if training is delivered in this way.

## Accessing training

Online training or using local networks is a cost effective way of keeping training costs down. The NHS Core Learning Unit offers the basic mandatory training packages for the NHS. Visit its website: [www.corelearningunit.com](http://www.corelearningunit.com)

For larger organisations, in-house training can be the most effective, particularly for mandatory training needs such as health and safety, fire and manual handling. Making links with the induction programme for all paid staff can be useful and will enable staff to understand the role of volunteers within the organisation and vice versa.

Volunteers already in place can help to identify what extra training needs could be useful for other individuals starting in the same role. They may also wish to further develop their role by helping to deliver or develop training themselves.

# Insurance

All organisations that engage volunteers should have an insurance policy which covers the individual while they are engaged on their volunteering activity. There are several types of insurance policy available, and the main criteria is that the policy should specifically mention volunteers as part of the cover. The main policies for organisations to consider are:

- employer's liability
- public liability
- professional liability
- personal accident cover
- insurance for volunteer drivers
- professional indemnity.

The NHS Litigation Authority (NHSLA) provides information for NHS trusts on what cover is required for volunteers and from what source it may be obtained. More information can be found on the NHSLA website: [www.nhsla.com/CoverForVolunteers](http://www.nhsla.com/CoverForVolunteers)

Volunteering England provides an **information sheet** outlining what the main points of the policies provide.

# Annex 1: Sample volunteer booklet and checklist

## Introduction and welcome

Welcome the volunteer to your organisation and give them background information about it – what type of NHS trust is it, number of sites and staff, what it specialises in and most importantly where volunteers are helping to deliver services and support.

## Diversity statement

Let the volunteer know that you value diversity and don't tolerate any form of discrimination.

## Voluntary services department

Talk through who you are, where you are, what you do and how to contact you.

## General information

**Sign in or volunteer register** – do you want your volunteers to sign in on arrival and out on leaving? It provides a record for fire and insurance purposes.

**Security passes** – where to collect, rules about wearing it, cost to them if they lose it. Returning it when they stop being a volunteer.

### Uniform, clothing and jewellery

- Be clear about expectations regarding a dress code.
- Outline what you expect if you supply a uniform, i.e. deposit, keeping it clean and tidy.
- Talk through any health and safety requirements in terms of clothing for staff who may volunteer on wards, for example wearing flat, fully enclosed shoes, low heels and so on.
- Jewellery and nail polish – explain what you expect in terms of helping to stop infection control and distraction.

**Accidents or incidents** – talk through where to report to and the importance of keeping a record.

**Personal property and facilities** – explain where personal property can be kept, whether or not it covered by insurance. Also cover where the toilets are, tea making facilities, rest rooms and fire exits.

**Car parking** – where it is, is there any entitlement to free parking?

**Transport** – access to any internal or staff transport systems.

**Personal safety** – outline your organisational policy and cover any specific circumstances relating to the volunteering role.

**General attitudes and behaviour** – outline your policy here, for example:

- volunteers are expected to treat all patients, service users, visitors and staff equally, fairly and in line with the trust's diversity policy
- no strongly expressed religious or political beliefs are to be expressed to patients, service users, visitors or staff
- don't be tempted to give advice on questions or subjects you know nothing about, refer the enquirer to a member of staff
- always ask the patients, service users, visitors or member of staff what they want, don't make assumptions on their behalf
- the individual beliefs of all patients, visitors and staff should be respected and treated with sensitivity
- you should not tolerate abuse, discrimination or aggression yourself, always report it to a member of staff
- respect the relationship boundaries between yourself, patients, service users and staff, this may vary with the volunteer role.

### **Expenses and travel claims**

All volunteers who are registered with the voluntary services department are entitled to claim out-of-pocket expenses. Explain how expenses are claimed and by what date their claim needs to be submitted by.

If the volunteer is using their own car, they will need to know the mileage allowance and rates. See Volunteering England's **information sheet** for comprehensive advice on this subject.

and HM Revenue and Customs: [www.hmrc.gov.uk/mileage/volunteer-drivers.htm](http://www.hmrc.gov.uk/mileage/volunteer-drivers.htm)

### **Meals/canteen facilities/breaks**

Talk volunteers through where they can eat their packed lunch, where to take their breaks and how often to take them.

### **Volunteers who are receiving benefits**

Let volunteers know who to go to for help with filling in forms and answering questions from the job centre.

## **Induction and training**

Outline your induction process and basic training for all volunteers, covering health and safety, fire and manual handling. Many trusts include infection control and customer care as part of this package. It's useful to include some 'crib notes' for people to refer back to at a later date.

Some volunteer roles will also require specific training needs.

## **Confidentiality and agreement form**

Include two copies of this in your induction pack for signing and returning (one to return and one for the volunteer to keep).

The form should outline their responsibilities regarding access to patient information and with regard to information held about themselves, and should reference the Data Protection Act 1998.

# Sample induction checklist

Print and sign two copies

<b>Department/unit and site</b>
<b>Volunteer's name</b>
<b>Member of staff responsible</b>
<b>Date</b>

Subject (could include)	Staff signature	Volunteer signature	Date
Where to sign in			
Where to put personal property			
Location of toilets			
Introduced to key staff			
Tea and coffee arrangements			
Explanation of client group			
Explanation of volunteer role			
Form filling			
Waste management			
Fire procedures and exits			
Manual handling training			
Health and safety training			
Customer care			
Food hygiene			
Diversity training			
Infection control			
Agreement and confidentiality docs received			
Agreement and confidentiality docs signed and returned			
Uniform received			
Equipment received (list)			
Pass received			

*This list is not exhaustive and is intended as a baseline to be added to or subtracted to depending upon the volunteer's role.*

**Always ask if you don't know. Keep a copy of this form for your records.**

Training updates		Date
<b>Training course updated/new course</b>		
<b>Signature of volunteer</b>	Sign here	PRINT NAME HERE
<b>Signature of staff responsible for volunteer</b>	Sign here	PRINT NAME HERE
<b>Position/job title</b>		

## Contact us

**[www.nhsemployers.org](http://www.nhsemployers.org)**

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