Aneurin Bevan University Health Board

Volunteer Framework

Caredigrwydd Kindness

Gonestrwydd Integrity

Parch Respect

Gofalu gyda'n gilydd
Together we care

This document is available in Welsh and English. It is also available in accessible formats on request.

N.B. Staff should be discouraged from printing this document. This is to avoid the risk of out of date printed versions of the document. The Intranet should be referred to for the current version of the document.

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Introduction

"Volunteering is recognised by the Welsh Government and the Third Sector Partnership Council as a 'good thing' for Wales, to be supported and promoted. It has benefits for the individual, for organisations and movements in which they are involved, and for communities more widely." *Welsh Government Volunteering Framework: Supporting Communities, Changing Lives* (2015).

Aneurin Bevan University Health Board recognises the significant and positive contribution made by volunteers, who give their time freely to enhance the experience of patients, their families, and carers. Volunteers bring additional value to services by complementing, not replacing, the work of paid staff, and by strengthening the compassionate, person-centred culture of the organisation.

The Health Board is committed to ensuring that all volunteers are welcomed, supported, and treated with respect and consistency. The volunteering experience should be positive, meaningful, and aligned with the Health Board's Values and Behaviours Framework, with clear governance arrangements in place to safeguard volunteers, service users, and staff.

Volunteering also plays an important role in supporting individual development and future workforce aspirations. The Health Board actively supports the ethos of 'Volunteer to Career', providing opportunities for volunteers to gain insights into health and care roles, access information and guidance about career pathways, and, where appropriate, apply to the Resource Bank and internal posts.

In line with our commitment to equality, diversity, and inclusion, volunteering opportunities will be accessible to people from all backgrounds. The Health Board will provide appropriate support and reasonable adjustments, including accessible formats, literacy support, language assistance, or digital inclusion measures, to ensure that all volunteers can fully participate.

Aneurin Bevan University Health Board considers the safety and wellbeing of patients, service users, volunteers, and staff to be paramount. Volunteers are therefore expected to work to the same high standards of conduct and care as paid staff, within the boundaries of their role and underpinned by robust governance, supervision, and risk-management processes.

Purpose of the Framework

The purpose of this Framework is to provide a clear, safe, and governance-led approach for engaging volunteers across Aneurin Bevan University Health Board. It sets out the structures, responsibilities, and standards required to ensure that volunteers are recruited, trained, supported, and supervised in a consistent and equitable manner. This enables volunteers to make a meaningful contribution while safeguarding the wellbeing of patients, service users, volunteers, and staff.

The Framework is designed to ensure that:

- **Volunteers can access positive, purposeful experiences** that make best use of their skills, interests, and motivations.
- **Volunteers are recruited, trained, and supported appropriately**, in line with Health Board governance, safeguarding, and quality requirements.
- **Staff understand their responsibilities in relation to volunteers**, enabling volunteers to contribute safely and confidently as part of a wider team.
- **Volunteering opportunities are incorporated into workforce planning and service redesign**, ensuring roles complement—not replace—paid staffing, enhance patient and staff experience, and support future workforce pipelines.
- **Opportunities are inclusive and accessible**, with reasonable adjustments, accessible formats, literacy support, language assistance, and digital inclusion measures available to ensure all volunteers can fully participate.

Through a structured and person-centred approach, the Framework aims to enhance:

- A sense of purpose and wellbeing for volunteers
- A positive experience for patients, families, and carers receiving volunteer support
- Staff confidence in working alongside volunteers
- Public assurance that volunteers are trained, skilled, and safely managed
- The Health Board's ability to identify, support, and grow future workforce talent, including through the Volunteer to Career ethos.

This Framework acts as a single point of reference for staff, volunteers, potential volunteers, and partner organisations, ensuring a high-quality, consistent, and accessible approach to volunteering across the Health Board.

Workforce Planning and Volunteering

Clinical teams are encouraged to consider volunteering opportunities as part of workforce planning and service redesign. This ensures that volunteer roles complement paid staff roles, support patient experience, and create pathways for individuals interested in healthcare careers. Volunteer involvement should be planned strategically, with clear governance and risk assessment, and never as a substitute for paid employment.

Definition of a Volunteer

Aneurin Bevan University Health Board adopts the Wales-wide definition of volunteering provided by the Welsh Council for Voluntary Action (WCVA):

"Volunteering is an important expression of citizenship and an essential component of democracy. It is the commitment of time and energy for the benefit of society and community and can take many forms. It is undertaken freely and by choice, without concern for financial gain."

Volunteering within the Health Board is underpinned by the following legislation, duties, and national frameworks, all of which remain current:

- **Well-being of Future Generations (Wales) Act 2015** – establishes legally binding well-being goals for public bodies, including Health Boards, and requires long-term, preventative, collaborative, and inclusive ways of working.
- **The Equality Act 2010** – protects individuals with protected characteristics and underpins non-discriminatory volunteer recruitment and engagement.
- **Care Aims Framework** – supports person-centred, outcome-focused service delivery.
- **A Healthier Wales (2019)** – sets out a vision for a whole-system approach to health and social care.
- **The Welsh Language (Wales) Measure 2011** – gives Welsh equal legal status and requires the Health Board to treat Welsh no less favourably than English.
- **Health and Social Care (Quality and Engagement) (Wales) Act 2020,** including the Duty of Candour – strengthens openness, transparency, and citizen voice in health services.
- **The New Approach to Volunteering in Wales (2025)**, Welsh Government. This provides the current national direction for modern volunteering, emphasising inclusion, good governance, prevention, and clear organisational volunteering strategies.

Together, these frameworks ensure that volunteering is undertaken safely, ethically, and in line with national expectations for quality, engagement, inclusion, and public accountability.

Volunteers engaged with Aneurin Bevan University Health Board will be fully aware of their role and the boundaries of their involvement. Employed staff must have a clear understanding of the nature, limits, and governance of volunteer activity. The role of the volunteer is complementary, never a substitute for paid staff, and volunteers must not undertake the work of paid staff, cover vacant posts, or be used during industrial action except within their usual, non-clinical, supportive capacity.

The experience offered to volunteers will always seek to match their skills, talents, and interests with the needs of the people and services they support, ensuring value, safety, and a positive contribution for all.

Volunteer Role Profiles

Volunteers engaged by Aneurin Bevan University Health Board are able to undertake a number of roles both within the organisation and across the community. These roles include those listed below, but volunteer role profiles are constantly being developed. Role profiles can be found at on the Aneurin Bevan University Health Board Intranet pages Aneurin Bevan University Health Board | Volunteering (wales.nhs.uk).

- Adverse Weather Driver
- BABI Volunteer
- Breastfeeding Peer Mentor Hospital based
- Care Home Volunteer
- Chaplaincy Volunteer
- Community Volunteer
- Dementia Companion
- End of Life Companion
- Expert by Experience Volunteer – Mental Health / Cancer Services / Stroke / Brain Injury / Alcohol Services / Cardiac Rehab
- Groups: Friendship / Cancer Café / GRACE's Place / Neuro / Cardiology / Breastfeeding Peer Mentor
- Hear in your Community Volunteer (Audiology)
- Hospital Befriender

- Hospital Welcomer
- Patient Experience Survey Volunteer
- Poppy Programme
- Research Champion
- Therapy Dog Volunteer
- Telephone Volunteer
- Walk and Talk
- Wellbeing Volunteer (staff role)

All role profiles identify:

- The experience and skills required
- The recruitment process and level of Disclosure and Barring Service (DBS) required
- Training requirements
- Key activities and duties to be provided by volunteers
- Duties and activities not to be performed by volunteers.

All role profiles are discussed and agreed with the Trade Union Partnership Forum (TUPF) before publishing. Volunteers should only be engaged in accordance with a role profile and therefore advice must be sought from the Patient Experience and Involvement Team regarding the development of new volunteering schemes or the introduction of new volunteer roles. The Patient Experience and Involvement Team will support the service area in undertaking an assessment of potential benefits and risks (including financial impact), ensuring robust governance, management and supervision processes are in place ahead of engaging volunteers.

Partnerships and Voluntary Organisations

Aneurin Bevan University Health Board embraces the value of partnership working to support, enhance, and expand volunteering opportunities across health and care settings. Partnership arrangements allow the Health Board to work collaboratively with voluntary and community organisations, drawing on their specialist expertise, strong community links, and ability to reach groups who may not otherwise engage with traditional recruitment routes.
Partnerships play an essential role in:

- **Strengthening community engagement** by involving organisations who have established trust and connections with local communities, helping widen access to volunteering opportunities.

- **Supporting inclusion and equity**, as voluntary organisations often work closely with people who experience barriers related to disability, language, social isolation, digital exclusion, or cultural background.
- **Enhancing service quality and safety** through shared governance, clearly defined roles, and alignment with agreed standards for recruitment, supervision, and safeguarding.
- **Improving volunteer experience**, as partnerships enable consistent support, training, and wellbeing oversight, particularly where organisations bring specialist skills (e.g., dementia companions, lived-experience roles, bereavement support, peer mentoring).
- **Strengthening the wider system**, including the Volunteer to Career pathway, by ensuring volunteering activity complements, not replaces, paid workforce roles while supporting future workforce aspirations.

To ensure safety, clarity, and accountability, a formal Partnership Agreement will be established between the voluntary organisation's nominated Senior Manager and the Aneurin Bevan University Health Board Patient Experience and Involvement Team. This agreement will include a clear, written commitment to the standards and principles outlined in this Framework. Partnership Agreements will be signed by the Chief Executives (or nominated representatives) of each partner organisation to ensure shared responsibility, governance, and accountability.

These partnerships ensure that volunteering across the Health Board is delivered in a safe, coordinated, and person-centred way, benefiting patients, volunteers, staff, and the wider community.

Accountability and Responsibility

Overall accountability for volunteering within Aneurin Bevan University Health Board rests with the Executive Director of Nursing, as delegated by the Chief Executive. This ensures that the volunteer function is subject to senior leadership oversight, aligned with organisational governance, and embedded within the Health Board's quality, safety, experience and workforce frameworks.

The Patient Experience and Involvement Team has operational responsibility for the governance, recruitment, core training, and oversight of volunteers across the Health Board. All volunteering activity must follow the Standard Operating Procedure Algorithm for Volunteer Processes (**Appendix 2**) to ensure a consistent, safe, and compliant approach.

The Patient Experience and Involvement Team works in partnership with Divisions to provide assurance around informal discussions, selection processes, and the suitability of volunteers for specific service areas. Divisional

teams must ensure that volunteer placement decisions align with service need, governance requirements, and safe operational practice.

Clinical teams have a responsibility to incorporate volunteering roles into workforce planning and service redesign, ensuring that volunteer roles enhance paid staff roles, improve patient and staff experience, and operate within robust governance structures.

The nurse in charge of the ward or the person leading the department is accountable for the day-to-day management, supervision, and support of volunteers within their area. Volunteers must be integrated into the team and provided with appropriate oversight to ensure safe and consistent practice. If a volunteer does not receive the support, supervision, or respect required, the Health Board reserves the right to reassign or withdraw them from the area to maintain a safe and supportive environment.

Some volunteer roles include supporting individuals within community settings (e.g., private homes, independent living schemes, or care homes). To safeguard volunteers and service users, the Health Board will undertake all relevant risk assessments, including environmental assessments of the premises and individual risk assessments of the client, particularly where lone working may occur. Volunteer engagement in these environments must not proceed until risk controls are confirmed and documented.

Clear governance guidance is provided in the Core Volunteer Training and Information Booklet, which is issued to all volunteers. Each volunteer will also have access to a designated Volunteer Lead within the Patient Experience and Involvement Team, ensuring clarity of roles, responsibilities, and escalation pathways.

The Patient Experience and Involvement Team is responsible for ensuring all volunteers engage with the appropriate risk assessments, including:

- Occupational Health Recommendations Risk Assessment
- Expectant Mother Risk Assessment
- Mental Health Ward Risk Assessment
- Young Person’s Ward Risk Assessment
- Community Visit Environmental Risk Assessment
- Community Visit Client Risk Assessment

All front-facing volunteers are responsible for adhering to infection prevention and control guidance at all times. Compliance with these standards is a core governance requirement and a condition of continued volunteer engagement.

Insurance

Scope of indemnity:
Volunteers engaged with Aneurin Bevan University Health Board (the Health Board) are indemnified when carrying out legitimate, authorised Health Board activities in good faith, within the boundaries of their agreed role profile and in accordance with this Framework, relevant policies, and training. Indemnity will not apply to any activity undertaken outside these parameters.

Organisational liability:
The Health Board accepts liability for the results of authorised volunteer activity carried out in good faith within scope. Volunteers remain responsible for working safely, following training and instructions, and not exceeding their role boundaries.

Equivalence of treatment:
Where volunteers, in the course of authorised activity, suffer loss or damage, the Health Board will act towards them as it would towards paid staff. Any concerns regarding indemnity or safety must be raised with the Patient Experience and Involvement Team (PEI Team) in the first instance.

Incident and risk reporting:
All incidents, accidents, near-misses, safeguarding concerns, data protection breaches, or property damage involving volunteers must be reported immediately via the Health Board's incident-reporting system and notified to the PEI Team for governance oversight and assurance monitoring. Follow-up actions, learning, and any necessary risk controls must be documented.

Driving and private vehicles:
Where volunteers use their own vehicles for authorised duties, they must hold a valid driving licence, MOT (where applicable), and ensure that their motor insurance policy explicitly covers volunteering-related travel. The Health Board does not insure private vehicles and will not provide cover for unauthorised, unreported, or non-compliant vehicle use. Annual checks of driving licence and insurance will be conducted in line with the Framework's procedures.

Partner and commissioned schemes:
External voluntary and community organisations managing volunteer schemes in partnership with the Health Board must maintain appropriate and current insurance for their volunteers, typically including:

- Public liability insurance
- Employer's liability insurance (where applicable)
- Professional indemnity insurance (where the role involves giving advice or specialist input)

Evidence of insurance must be provided on request and form part of the Partnership Agreement. The partner must notify the Health Board of any material changes to insurance cover without delay.

Major incidents and exceptional deployment:
During major incidents, volunteers will only be deployed to non-clinical, risk-assessed duties and only when directly requested by the PEI Team or the relevant Service Lead. Indemnity applies solely to activities expressly authorised for that incident period and subject to Health Board safety controls.

Indemnity exclusions:
Health Board indemnity does **not** extend to:

- Actions outside the volunteer's agreed role profile or without appropriate authorisation
- Criminal, fraudulent, malicious, or reckless acts
- Activities undertaken in breach of Health Board policies, mandatory training, or safety procedures
- Use of private vehicles without appropriate insurance or in contravention of road traffic law
- Personal activities unconnected with Health Board volunteering

Equality, Diversity and Inclusion

Aneurin Bevan University Health Board is committed to promoting equality, diversity, and inclusion across all aspects of its volunteering programme. This commitment applies to every stage of the volunteer journey, from enquiry and recruitment through to training, placement, supervision, and ongoing support, and is explained to volunteers as part of their induction and core training.

The Health Board welcomes volunteers from all sections of the community and is committed to ensuring fair, transparent, and non-discriminatory processes. No volunteer or applicant will be treated less favourably on the basis of a protected characteristic, and decisions relating to engagement or role suitability will be made in accordance with the Equality Act 2010, the Human Rights Act, and all Health Board equality, diversity, and inclusion policies.

Volunteering within the Health Board may commence from the age of 16 (with parental or guardian consent). Engagement processes follow the Aneurin Bevan University Health Board Recruitment and Selection Framework, applying the same principles of fairness, safeguarding, and non-discrimination expected of all Health Board appointments.
Where a volunteer discloses a disability or health condition, at any stage, including once already active, a risk assessment will be undertaken to identify specific needs and determine any reasonable adjustments required. The

Volunteer Lead will work with the volunteer to ensure these adjustments enable safe and equitable participation.

To ensure full accessibility and inclusion, volunteers will be offered support tailored to their needs, which may include:

- information in accessible formats (e.g., Easy Read, large print, audio)
- translation or interpretation
- literacy or comprehension support
- digital inclusion assistance for online systems, training, or communications
- adapted training or supervision approaches

The Health Board is committed to removing barriers to participation and ensuring every volunteer can contribute safely and confidently.

Welsh Language Standards

The Welsh Language (Wales) Measure 2011 places statutory duties on the Health Board through the Welsh Language Standards. These Standards require the organisation to provide high-quality and equitable bilingual services to patients, service users, carers, and the public, and ensure that the Welsh language is treated no less favourably than English.

Volunteers play an important role in supporting these duties. Their contribution helps create a more welcoming and culturally sensitive environment for Welsh-speaking patients, families, and carers. Volunteers are therefore routinely briefed on bilingualism, supported to understand the Standards, and provided with mandatory Welsh Language Awareness training as part of induction.

Welsh-speaking volunteers, or those learning Welsh, are encouraged to declare their linguistic skills. They will be supported to use Welsh in their volunteering role and will be provided with *Working Welsh* merchandise to make their language abilities visible to patients, visitors, and staff.

The Health Board recognises that promoting the Welsh language is also part of achieving the national well-being goals set out in the Well-being of Future Generations (Wales) Act 2015, including the goal of fostering a Wales with a vibrant culture and thriving Welsh language. Volunteers are therefore an important partner in promoting cultural equity, dignity, and choice for those accessing Health Board services.

Training, Supervision and Support

Volunteers have the right to receive high-quality, relevant training, supervision, and support to enable them to carry out their duties safely, confidently, and effectively. The Health Board has a responsibility to ensure training is delivered in line with organisational governance, while volunteers have a responsibility to participate fully in training relevant to their role.

Core Mandatory Training, as defined within each role profile, will be provided or facilitated by the Patient Experience and Involvement Team. This training ensures volunteers understand the governance, safety, and conduct expectations of the Health Board and includes:

- Equality, Diversity and Inclusion
- Safeguarding
- Safe Working / Health and Safety
- Confidentiality and Data Protection
- Infection Prevention and Control
- Communicating with Someone with a Hearing Loss
- Welsh Language Awareness
- Dementia Awareness

Mandatory and role-specific training must be completed before a volunteer begins their active duties. Additional, specialist, or enhanced training will be provided where required for specific volunteer roles.

To support accessibility and inclusion, all training will be offered in a manner appropriate to individual needs. This may include accessible formats (e.g., Easy Read, large print, audio), translation or interpretation support, literacy or comprehension support, or digital inclusion assistance for volunteers unfamiliar with online learning systems or electronic communication. Staff are responsible for ensuring reasonable adjustments are identified and implemented appropriately.

Where opportunities for additional non-mandatory training are available, these will be offered to volunteers to support development, confidence, and enrichment, but completion of these modules is not required.

A local induction will be provided by the relevant Department Lead, supported by the Patient Experience and Involvement Team where necessary. Local induction ensures volunteers understand the environment in which they will be working, including:

- introduction to staff and key contacts
- orientation to the physical environment
- emergency procedures and safety briefings
- Personal Protective Equipment (PPE) guidance

- expectations of conduct, communication, and boundaries

Supervision and ongoing support form an essential part of safe volunteer practice. Every volunteer will have access to a designated contact for guidance and escalation. Supervision arrangements must be proportionate to the volunteer role and clearly communicated to ensure consistent, safe, and well-governed practice across all areas.

Expenses

Aneurin Bevan University Health Board will ensure that there is a clear, consistent, and accessible system for claiming out-of-pocket expenses and that all volunteers are aware of the procedure. No volunteer should be left out of pocket as a result of undertaking authorised volunteering duties.

Payment of expenses:
Travelling expenses will be paid to volunteers at the rate approved by HMRC, and current guidance will be included in the Core Volunteer Training Information Booklet. Volunteers may also claim other reasonable out-of-pocket expenses directly related to their authorised volunteer duties, as agreed in advance with the relevant Service Lead.

Governance, assurance and consistency:
All volunteer expenses must be reimbursed in a consistent and transparent manner. Each Division is responsible for ensuring that suitable budget provision is identified before a volunteer scheme commences. Reimbursement must be authorised by the relevant Volunteer Lead or senior manager and paid only on production of receipts or acceptable evidence, where required. Robust records must be maintained to ensure financial accountability and audit compliance.

What expenses may include:
Permitted expenses typically include:

- travel to and from the volunteering location
- parking costs where unavoidable
- refreshments in line with Health Board policy (e.g., if volunteering for four hours or more)
- other pre-approved costs reasonably incurred in the course of volunteering duties

Expenses must relate directly to authorised volunteering activities and be claimed within agreed timeframes.

What expenses cannot include:
Expenses will **not** be paid for:

- costs related to personal commitments or routine daily travel

- unapproved purchases
- travel undertaken outside an authorised rota or placement
- clothing or equipment not approved or issued by the Health Board

Volunteers must seek approval before incurring any non-routine expense.

Accessibility and inclusion:
To ensure volunteers are supported equitably, the expenses process will be available in accessible formats, including:

- Easy Read
- large print
- verbal explanation
- staff-supported completion for those with literacy or digital barriers
- support to submit claims electronically where digital inclusion is an issue

Staff must ensure that volunteers understand the process and know how to submit claims.

Digital processes:
Where electronic systems are used for submitting expenses (e.g., via email, online form or the Assemble app), volunteers who require support with digital skills must be offered assistance. This prevents digital exclusion and ensures equitable access to reimbursement.

Externally managed volunteer schemes:
All volunteer commissioning contracts, Service Level Agreements (SLAs) and Memoranda of Understanding (MOUs) must specify:

- how expenses will be paid
- which organisation holds budget responsibility
- what evidence or approval is required
- assurance that volunteers will not be financially disadvantaged

Partner organisations are responsible for ensuring their volunteers are reimbursed appropriately and in line with agreed governance standards.

Financial safeguarding:
Volunteers must never use personal funds to subsidise Health Board activity. Any situation where a volunteer may unintentionally incur personal cost should be escalated to the Volunteer Lead immediately.

General Data Protection Regulations

In compliance with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018, the Health Board will ensure that only information essential to the volunteer engagement process is requested, collected, and processed. All personal information will be handled lawfully, fairly, and transparently, and only used for the specific purposes of volunteer recruitment, engagement, governance, and ongoing communication.

Personal information will be stored securely in line with Health Board Information Governance policies. It will not be shared with any third party without the volunteer's explicit consent unless the Health Board is legally obliged to do so (for example, for safeguarding, legal disclosure, or regulatory purposes).

Volunteers will be informed of:

- what personal data is collected
- the lawful basis for processing
- how their information will be stored and used
- how long their information will be retained
- how they can access, rectify, or request deletion of their information
- who to contact for data protection concerns

Further information on how the Health Board collects, stores, and uses personal information is available in the Health Board's Privacy Notices, which can be found on the Health Board's internet and intranet pages.

Where volunteers require support with literacy, comprehension, language, or digital access, information will be provided in accessible formats (e.g., Easy Read, large print, audio, translation, or verbal explanation) to ensure compliance with GDPR principles of fairness and transparency.

Records and Information Governance

Asset forms relating to the storage of confidential information will be completed and sent to the Information Governance Department. All systems, files, and repositories used for volunteer information must be recorded on the Information Asset Register, with clear ownership, appropriate access controls, and risk assessments in place.

Volunteer data held electronically (e.g., via Assemble) must comply with Health Board digital and cyber security requirements, including password protection, secure access, and appropriate role-based permissions.
Any data breaches, suspected or confirmed, involving volunteer information must be reported immediately through the Health Board incident-reporting system and escalated to the Information Governance team for review and appropriate action.

Records Management and Storage

All engagement documentation for individuals not successful in becoming volunteers with Aneurin Bevan University Health Board will be retained for a period of one year to enable any queries or complaints to be managed appropriately, after which it will be securely destroyed in accordance with Health Board Records Management Policy and UK GDPR requirements.

All engagement documentation for individuals who are successful in becoming volunteers will be retained electronically in a secure folder and/or within the Assemble application. These records will form part of the Health Board's Information Asset Register and will be subject to appropriate access controls, audit requirements, and cyber-security standards. Access will be restricted to authorised staff only and monitored to ensure compliance with Information Governance policies.

In accordance with the Disclosure and Barring Service (DBS) Code of Practice, DBS documentation will be stored securely within the volunteer's electronic file. Only information necessary to evidence clearance will be retained. DBS information will be kept in line with statutory requirements, held separately from general engagement documentation, and deleted securely once no longer required for safeguarding or assurance purposes.

Implementation

This Framework will be monitored and reviewed on a three-yearly basis by the Patient Experience and Involvement Team to ensure it remains aligned with legislation, national policy, and Health Board governance requirements. Interim reviews may be undertaken sooner where changes in national guidance, legislation, or organisational policy require updates.
The Patient Experience and Involvement Team will support service areas in the Framework's implementation by providing advice, training, and oversight to ensure that volunteer engagement processes are applied consistently and safely across the Health Board.

This Framework will be communicated to staff via the Intranet and supported by additional guidance, awareness sessions, and resources provided by the Patient Experience and Involvement Team.

Workforce planning processes must incorporate consideration of volunteering roles where appropriate, ensuring that volunteer activity enhances, rather than replaces, paid workforce functions and supports long-term service sustainability, quality, and patient experience.

For further information, contact the Patient Experience and Involvement Team at **abb.Ffrindimi@wales.nhs.uk**.

This Framework has undergone an equality impact assessment screening process using the toolkit designed by the NHS Centre Equality & Human Rights. Details of the screening process for this Framework are available from the Framework owner.

Appendices

Appendix 1: Processes for Experience of Volunteers

1. Experience

Identified staff in the relevant area and the Patient Experience and Involvement Team are responsible for the engagement of volunteers.

All information for engaging volunteers can be found in the Volunteer Framework. Advice may also be sought from the Patient Experience and Involvement Team (ABB.Ffrindimi@wales.nhs.uk).

1.1 Advertising

Staff must liaise with the Patient Experience and Involvement Team regarding the advertising of any volunteer roles. Some roles may be advertised externally via third parties such as Wales Council for Voluntary Action (WCVA), Gwent Association of Voluntary Organisations (GAVO) and Torfaen Voluntary Alliance (TVA) and via the Aneurin Bevan University Health Board Communication Team where they can advertise via Facebook.

1.2 Volunteer Role Profile

The Patient Experience and Involvement Team and Service/Department Leads are responsible for drawing up a role profile which clearly defines the activities that can be performed by volunteers and any activities not to be undertaken. This should include the desirable personal attributes required to match the right person to the role. All new role profiles must be discussed with the Trade Union Partnership Forum (TUPF) before final adoption.

The Patient Experience and Involvement Team must always be informed of the development of new volunteering roles or schemes. Contact the Patient Experience and Involvement Team for the full list of all available volunteer role profiles.

All volunteers will have their responsibilities clearly explained and will agree to the terms of the role profile.

1.3 Volunteer Hours

Most people volunteer for one or two sessions per week; an average session being two to four hours but may vary as agreed between the volunteer and the service area. A volunteer will be encouraged to work in a specific area on a regular basis rather than travelling between departments or wards.

Staff in the area will ensure that all volunteers under their supervision are able to manage the hours they have committed to and will agree commitment on

an individual basis taking into account the wellbeing and wishes of the volunteer and the needs of the department, clients or patients.

Therapy dog volunteers should restrict visits to one hour, for the welfare of the dog, in line with Sled Dog Society of Wales Therapy Dogs, Pets as Therapy and Therapy Dog Volunteers Nationwide guidance. If wished, the owner may pause the visit after an hour and resume after resting the dog.

2.0 Recruitment Process

All volunteers must complete the full recruitment process (as detailed below), Core Training, Dementia Awareness; any additional training required for the role, be provided with an identity badge, and have an induction with the appropriate volunteer lead before commencing their active role.

Contact the Patient Experience and Involvement Team for all necessary forms, role profiles and information regarding training. See **Appendix 2** for the Volunteer Process Algorithm.

To ensure all volunteers can fully understand the information provided, accessible formats and support will be offered wherever reading, language, digital skills, or comprehension may be a barrier. This may include information being read aloud, the use of Easy Read formats, translations, large print versions, audio formats, staff-supported explanations, or support to navigate digital processes (such as online forms, training, or email communication).

Where a volunteer cannot read, has difficulty understanding written information, or is not digitally literate, staff must take reasonable steps to ensure the volunteer has fully understood the content and can access any required digital processes. Staff must also record how the information was provided. Volunteers may confirm their agreement by signing, making a witnessed mark, or providing documented verbal consent where appropriate.

2.1 Informal Discussions

As part of the recruitment process it will be necessary to hold an informal discussion prior to engagement. The member of staff must be satisfied that the volunteer possesses the appropriate personal qualities for a volunteering role within Aneurin Bevan University Health Board and is prepared to operate according to the volunteering governance (as per Volunteer Framework) and Health Boards Values and Behaviour Framework. The Patient Experience and Involvement Team will support the informal discussion process where requested.

2.2 Identity and Signature Check

The identity and signature of the candidate must be verified at the informal discussion. For detailed guidance about pre-engagement document checks please contact the Patient Experience and Involvement Team. A photocopy of the document verifying identification must be placed on the volunteer's engagement file.

2.3 Immigration Status

Enquiries should be made at the informal discussion in respect of the immigration status of all candidates and relevant documents viewed and photocopied. It is not possible to obtain work permits for volunteers. Any voluntary role must not begin until the immigration status of the candidate has been confirmed as satisfactory. Contact the Patient Experience and Involvement Team for a detailed guidance about pre-engagement checks.

2.4 Claiming Benefits

If a volunteer is unemployed and claiming benefits, they must notify the Department of Work and Pensions that they are undertaking volunteering duties. The Volunteer must contact the Job Centre Plus and Department of Work and Pensions for up-to-date advice before starting voluntary activity, as indicated on the ABUHB volunteer Application form.

2.5 References

Volunteers are required to provide two-character references, satisfactory to Aneurin Bevan University Health Board. Voluntary activity must not begin until two satisfactory references have been received.

2.6 Disclosure and Barring Service (DBS)

Aneurin Bevan University Health Board fully complies with the DBS code of practice. For further information about DBS disclosures please refer to the DBS website (www.gov.uk/dbs). All volunteer roles will be assessed to determine whether or not a DBS check is required and if so at what level. If the role requires a DBS check the volunteer will not be able to commence their role until clearance is received.

The minimum age at which someone can be asked to apply for a DBS check is 16 years old.

Under the Rehabilitation of Offenders Act (1974) Exception Order, volunteers are required to declare all previous criminal convictions. This information will be confidential and will not necessarily prejudice the volunteer being accepted; however, the information is important for the purposes of engagement.

A criminal record will not necessarily bar an applicant from becoming a volunteer within the Health Board. This will depend on the nature, circumstances, and background to the offence, when the offence took place and the age of the applicant at the time the offence was committed.

2.7 Occupational Health Clearance

Volunteers will be required to complete an Occupational Health Questionnaire and may be required to undertake health screening procedures as defined by the Occupational Health Department. The volunteer will not be able to commence their role until Occupational Health clearance is received.

2.8 Young volunteers

The minimum age for volunteering within the Health Board is 16 years of age. However, department managers may decide that certain voluntary roles are unsuitable for volunteers under the age of 17 or 18. There is no upper age limit.

For the sake of clarity, 'young volunteers' in this Framework refers to people 16 - 18.

There is an enhanced duty of care when involving young volunteers. An individual risk assessment will enable a proper judgement to be made on whether placing a young person in a voluntary role would put them or the people they work with at risk. The following basic principles should be adhered to:

- Young people under the age of 18 will need a parent/guardian's consent to do voluntary activity.
- Young people will be supported by staff in the relevant areas for their role.
- Induction, training, and supervision may have to be amended or increased for young volunteers.

2.9 Confidentiality

All volunteers will receive confidentiality training and must be given a confidentiality agreement to read and agree. Where a volunteer has difficulty reading or understanding written information, staff must follow the processes outlined in the Equality, Diversity, Inclusion and Accessibility section of this Framework to ensure appropriate support and reasonable adjustments are provided.

2.10 Expectations

All volunteers will be given a statement of expectations form to read and agree at the recruitment stage. Where a volunteer has difficulty reading or understanding written information, staff must follow the processes outlined in the Equality, Diversity, Inclusion and Accessibility section of this Framework to ensure appropriate support and reasonable adjustments are provided.

2.11 Volunteer Agreement

When all relevant checks have been completed and forms agreed, the Patient Experience and Involvement Team will complete and send a volunteer agreement to the applicant with information about commencing the volunteer role. Where a volunteer has difficulty reading or understanding written information, staff must follow the processes outlined in the Equality, Diversity, Inclusion and Accessibility section of this Framework to ensure appropriate support and reasonable adjustments are provided.

3.0 Driving

Volunteers using motor vehicles in connection with their placement must ensure that they have the appropriate insurance cover, current MOT certificate and a valid driver's license for the vehicle that they will be using in order to claim travel expenses.

To ensure volunteers are covered for insurance, it is essential that their insurance company is aware that they intend to drive within their volunteer role and this is reflected on their certificate. The volunteer must ask for volunteering activity to be included in their 'leisure use' premium and there shouldn't be any extra costs associated (although administration charges may be incurred).

The Patient Experience and Involvement Team must carry out annual checks of driving license and insurance cover.

4.0 Induction and Training

Designated leads in the service area will be responsible for ensuring that a suitable induction takes place within the area before the volunteering activity begins. The responsibility for providing Core Training is with the Patient Experience and Involvement Team. Additional training, including mandatory updates rests with the designated leads in the service areas and is based on the relevance to their volunteering activity.

5.0 Identification Badges

Volunteers will be issued with an identification badge after their identity has been confirmed (see 2.2). Volunteers will not commence their placement until an identification badge has been issued.

6.0 Introductory Period

Volunteer placements will be for an agreed introductory period initially (up to 3 months). The placement will then be reviewed with the volunteer and staff/client concerned to ensure that all parties are happy to continue with the arrangement. If either party is not happy, alternative options will be discussed.

7.0 Management and Supervision

Although overall governance of volunteer services sits with the Patient Experience and Involvement Team, the day-to-day management of volunteers engaged by the Health Board is the responsibility of the ward, unit or department where the volunteer is placed. Volunteers will be informed of whom to approach for support and have regular access to that person.

7.1 Partnership Organisations

Where volunteer schemes operate in partnership with voluntary organisations, specific formal arrangements for the management and supervision of volunteers will be drawn up and agreed as part of the Partnership Agreement.

7.2 Regular Supervision and Support

Opportunities will be available for volunteers to discuss their role, contribution and/or any problems or issues that may arise. The frequency, duration and format of this support and supervision will be discussed with the volunteer. Feedback for volunteers is important together with acknowledgement of their contribution.

7.3 Ending a Volunteer Agreement

Aneurin Bevan University Health Board reserves the right to ask volunteers to discontinue their engagement and will provide reasons in writing upon request.

Aneurin Bevan University Health Board recognises that volunteers can suspend or cease their involvement at any time.

Volunteers who decide to leave should be encouraged to provide feedback to the service about their experience.

Volunteers are required to return their identification badge, uniform and any access codes or keys (where appropriate) at the end of their volunteer placement.

Where appropriate service leads will inform relevant departments that a volunteer has ceased their activity.

8.0 Recognition of Volunteers

Aneurin Bevan University Health Board wants all volunteers to feel valued and respected both as individuals and in their roles. Service leads and department managers are responsible for making sure the work of volunteers is recognised and appreciated, both informally and formally. This may include making announcements on the intranet and on social media such as Facebook and/or nominating volunteers for awards and attendance at volunteer recognition events.

9.0 Volunteer Uniform

Aneurin Bevan University Health Board requires all Health Board managed volunteers to wear the designated volunteer uniform while undertaking their duties on site. Wearing the uniform ensures that volunteers are clearly identifiable to patients, staff, and visitors, and supports compliance with infection prevention and control requirements.

For volunteers operating on-site as part of an externally managed volunteer scheme, the external organisation is responsible for providing appropriate uniform and identification. These must meet Health Board standards for identification and infection prevention and control to ensure consistency and safety across all volunteer activity on Health Board premises.

10.0 Volunteer Absence

All sickness and holidays should be reported to the Service Lead. Volunteers taking long term sickness may need to be referred to the Occupational Health Department before returning to their role.

11.0 Raising of Concerns

If a volunteer has concerns about the treatment of a patient, member of staff or any other individual they must raise this immediately with the Service Lead or an appropriate member of staff. Concerns about the welfare of a child or adult, who may, for example be a visitor or relative, should be raised in the same way.

If a member of staff has concerns about a volunteer's behaviour, conduct, capability, or safety, these concerns must be reported immediately to the Patient Experience and Involvement Team. Depending on the nature of the concern, this may trigger:

- A review meeting with the volunteer
- Temporary suspension of volunteer duties
- Escalation under safeguarding procedures (for concerns involving risk to patients, children, or adults at risk)
- Formal investigation in line with Health Board volunteer management processes

All concerns whether raised by volunteers or staff must be handled promptly, fairly, and in accordance with safeguarding and Health Board policies.

12.0 Disputes/Disagreements

Every effort will be made to settle any dispute fairly and amicably.

If a volunteer encounters a difficulty with any aspect of the volunteering activity, they are encouraged to talk to their Volunteer Lead as soon as possible for advice and support. There is no formal contract between the Health Board and the volunteer however, it is important that the Health Board is able to maintain agreed standards of service to its patients and service users. It is also important that volunteers enjoy making a contribution to the service.

If a volunteer is dissatisfied with any aspect of their placement they should:

1. Discuss their dissatisfaction with the appropriate person in charge of the area or to their Volunteer Lead.

2. If that does not resolve the concern, then a meeting can be arranged with the most appropriate person.

3. If that does not resolve the issue it will be escalated to the next level of appropriate management.

4. If after this, it is not possible to resolve the dispute/disagreement, then it may be inappropriate for the volunteer to continue in their role.

5. At all times the volunteer will be freely able to state their concern and have a friend, relative or volunteer colleague to accompany them to any meeting they may attend.

13.0 Conduct and Safety Issues

Aneurin Bevan University Health Board reserves the right to end a volunteer engagement if it is deemed to be unsuitable. Reasons could include continued ill health, unreliability, breach of confidentiality, conflict of interest, failure to comply with Framework and procedure or criminal activity.

Aneurin Bevan University Health Board has a duty of care to ensure that volunteers do not continue beyond a point where volunteering may be detrimental to their own or other people's health or safety. If such a situation occurs it may decide that it is appropriate for a volunteer to reduce, amend or cease their volunteer contribution.

If Aneurin Bevan University Health Board has concerns about a volunteer, it may be necessary for them to be asked to refrain from volunteering, without prejudice, while further enquiries are made. The following steps will be taken:

1. A meeting will be arranged, as soon as practicably possible, where the Volunteer Lead will explain the concerns to them.

2. If that does not resolve the concerns, then a meeting will be arranged with the most appropriate person.

3. If that does not resolve the issue it will be escalated to the next level of appropriate management.

4. If after this, it is not possible to resolve the concerns, then it may be inappropriate for the volunteer to continue in their role.

5. At all times, the volunteer will be freely able to state their case and have a friend, relative or volunteer colleague to accompany then to any meeting they may attend.

In cases of serious misconduct, the volunteer's engagement with Aneurin Bevan University Health Board will be stopped immediately. Advice from other departments may be sought.
Complaints from the public about volunteers should be investigated in accordance with the Health Board's Putting Things Right Framework.

14.Volunteers and Major Incidents

In the event of a Major Incident, volunteers may be asked to support essential non-clinical tasks such as wayfinding, providing information to visitors, or assisting with practical duties. Volunteers will not undertake clinical activities or be placed in unsafe situations.

Volunteers will only be deployed if contacted directly by the Patient Experience and Involvement Team or the relevant Service Lead. They must not attend site unless requested. Clear instructions, supervision, and a named staff contact will be provided throughout.

All volunteer activity during a major incident must follow Health Board safety, infection-prevention, and site-access requirements. Volunteers may be stood down at any time if conditions change.

Following a major incident, volunteers will have access to debriefing and appropriate wellbeing support.

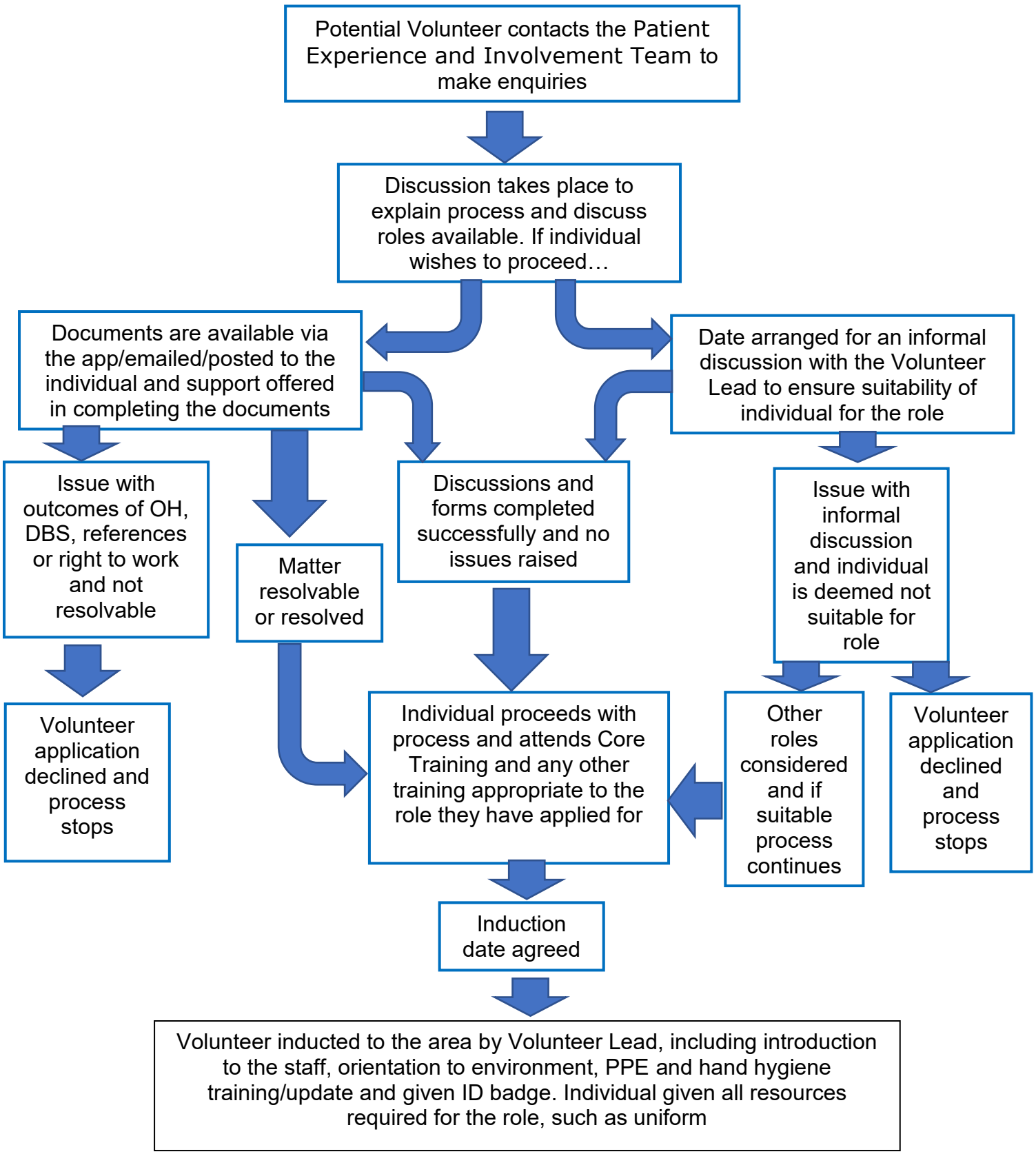
15.0 Expenses

Volunteer Leads are responsible for ensuring that individual volunteer schemes reimburse expenses where appropriate and for ensuring that their volunteers are aware of the procedure.

Expenditure for out-of-pocket expenses, such as travel expenses, incurred by volunteers will be borne by the relevant Division. Other costs may include protective clothing and uniforms. Appropriate budgets for all expenses relating to volunteering must be identified and confirmed before a volunteer scheme commences.

Reimbursement of expenses must be authorised by the Volunteer Lead or relevant senior manager and can only be reimbursed upon production of receipts (where identified) and confirmation of attendance on dates specified.

Appendix 2: Standard Operating Procedure Algorithm for Volunteer Process



Appendix 3: Addendum to Training, Supervision and Support

Aneurin Bevan University Health Board welcomes applications for volunteer roles from current members of staff.

Whilst the full volunteer recruitment process needs to be completed for all external applicants, fast track processes have been agreed for current ABUHB staff and NHS Wales staff, which includes Accreditation of Prior Learning to be applied for the elements of mandatory training completed.

It is the responsibility of the relevant Volunteer Manager to ensure that documentary evidence is received and stored on the Volunteer's individual folder before APL can be applied.

Any outstanding elements will need to be addressed through the Core Volunteer Training programme.

There is no change to the requirement for all volunteers to attend the Dementia Awareness session on a one off basis.