

Dear Colleague

REFRESHED STRATEGY FOR VOLUNTEERING IN THE NHS IN SCOTLAND

Summary

1. The annex to this letter sets out a 3 year strategy and action plan (2008-2011) for refreshing volunteering within the NHS in Scotland. It supersedes previous guidance issued under MEL (1998)42 and [MEL \(2000\)4](#).

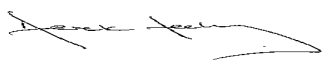
Action

2. Chief Executives must ensure that this letter and the attached guidance are brought to the attention of, and implemented by, all appropriate staff and in particular ensure that:

- by the end of April 2008 Volunteer Development Scotland (VDS) is provided with details of:
 - a designated person within their Board area who will lead on volunteering (it is suggested that this might appropriately sit with PFPI Designated Directors); and
 - contact details of all Volunteer Service Managers within their area;
- an Equality Impact Assessment of their volunteering policy is undertaken;
- a local strategic action plan for volunteering is developed in partnership with key local stakeholders during 2008/09;
- that their Board, working in partnership with VDS, achieves the *Investing in Volunteers Standard* by 31 March 2011.

3. Officials will meet regularly with VDS to obtain updates on progress of the Action Plan and with Boards to monitor the support provided to them in relation to the implementation of the strategy. An evaluation of this work will take place in December 2010.

Yours sincerely



Derek Feeley

CEL 10 (2008)

February 2008

Addresses

For action

Chief Executives, NHS Boards
Chief Executives, Special
Health Boards

For information

Chief Executive, National
Services Division
Executive Director,
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STRATEGY FOR VOLUNTEERING IN THE NHS IN SCOTLAND

Policy

1. The Better Health, Better Care action plan commits¹ us to:

“working together with Volunteer Development Scotland, to refresh the strategy on NHS Volunteering, recognising the various roles played by the third sector and considering how best to recognise the role played by volunteers. We will then go further and require all NHS Boards to achieve the *Investing in Volunteers Standard* – the nationally recognised standard which guarantees a quality experience for volunteers”.
2. This will require Boards to:
 - provide VDS with details of a designated person within their Board area (possibly PFPI Designated Directors) who will lead on volunteering and contact details for all VSMs in their area by the end of April 2008;
 - equality impact assess their volunteering policy;
 - develop a local strategic action plan for volunteering in partnership with key local stakeholders during 2008/09;
 - ensure that their Units and Divisions maximise the opportunity volunteers offer for complementing the skills of their clinical staff;
 - ensure co-operation and support is given internally to staff involved in volunteering and to VDS to ensure that the strategy and action plan outlined in this document are progressed in accordance with the targets set;
 - work in partnership with VDS to achieve the *Investing in Volunteers Standard* by 31 March 2011;
 - review and report progress on volunteering within their Annual Review self-assessment reporting process as part of their performance in relation to their PFPI responsibilities beginning in 2008/09;
 - consider with Community Planning Partners whether a generic strategy for volunteering in the area is appropriate;

The Strategy

3. During the three year period to March 2011, VDS will work in partnership with NHS Boards to increase the focus on volunteering in Scotland's NHS, to get NHS Boards thinking about it, planning for it, reviewing it, evaluating it, developing partnerships on it and sharing any learning on it with others. By increasing the profile of volunteering in Scotland's NHS the strategy will seek to achieve the following 3 outcomes:

- for Scotland's NHS – improving the health and wellbeing of the users of NHS services (patients/users and their families/carers) by enhancing the quantity

¹ See Third Sector section on page 14 of the Better Health, Better Care Action Plan at <http://www.scotland.gov.uk/Resource/Doc/206458/0054871.pdf>

and diversity of volunteers and the effectiveness of their contributions to health delivery;

- for volunteers – ensuring that they have a consistently positive experience, whenever and wherever they volunteer in Scotland’s NHS;
- for national and local volunteering support bodies – providing a framework for quality standards in volunteer development in Scotland’s NHS and creating a platform for better recognition of the importance of volunteering in Scotland’s NHS.

4. In order to achieve these outcomes and address the areas stakeholders identified as needing attention (listed in paragraph 10 of Appendix B) volunteering throughout the NHS in Scotland must be placed onto a consistent footing. This will require co-ordinated action from people working in geographical NHS Boards, key NHS national support bodies, key bodies involved in developing volunteering and those organisations outwith Scotland’s NHS who are funded by NHS Boards to provide and support volunteers.

5. To make progress towards achieving the outcomes NHS Boards must:

- be clearer about what constitutes volunteering in Scotland’s NHS to ensure that all volunteers are treated fairly and consistently and have access to appropriate support and assistance. A definition is given in Appendix B;
- ensure effective leadership in volunteering is in place. A National Action Group (details below) will be established to provide national leadership. Locally NHS Boards must consider how to provide leadership and drive in the implementation of the strategy. This may take the form of a local “stand alone” group in the first instance to give the local strategic action plans clear and visible drive and leadership;
- plan for continuous improvement in volunteering management and establish and demonstrate effective reviewing of local strategic plans;
- create a positive and consistent environment for volunteering. Achieving the Investing in Volunteers Standard demands that the whole organisation values, manages and supports volunteers and their contributions. All NHS Boards must have an employer supported volunteering policy in place by 31 March 2010 as part of existing Human Resources Policy or as a stand-alone policy;
- develop a modern, dynamic and robust infrastructure for volunteering by seeking to enter into partnerships with organisations that have relevant expertise, for example their local Volunteer Centres and other relevant bodies to identify how they can add value to each others work in the field of volunteering;
- broaden the range of people involved in volunteering by ensuring that their volunteering policy is Equality Impact Assessed and barrier free. The National Action group will develop recommendations in conjunction with key national partners on how to support joined up and co-ordinated action;
- measure the impacts of volunteering and sharing learning. VDS is currently working with 4 NHS partners to pilot the Impact assessment toolkit and will provide feedback on the findings of this work in the autumn 2008. VDS will thereafter provide support for a further 5 NHS Boards in the use of the toolkit over the period of the Action Plan.

Partnership with VDS (VDS)

6. To provide support and assistance in achieving these outcomes the Health and Wellbeing Directorate has entered into a strategic partnership with VDS, the National Centre for Excellence in volunteer development, over the period 2008 -11.

7. During this time VDS will work closely with appropriate stakeholders by establishing (early in 2008) a National Action Group comprising of key NHS and volunteering bodies, such as NHS Health Scotland, NHS Education, NHS Quality Improvement Scotland, national volunteer engagers outwith Scotland's NHS, representatives from a selection of geographic Boards (which will include a Volunteer Service Manager) and the volunteer centre network. Professor Heather Tierney-Moore, Nurse Director of NHS Lothian will Chair the National Group. The remit and membership of the Group will be placed on the Scottish Government website at: www.scotland.gov.uk/Topics/Health/NHS-Scotland/Boards/VolunteeringStrategy when available.

8. VDS will support Boards through the National Action Group to develop consistently high quality approaches to volunteering and to maximise the benefits volunteering brings to patients, users, carers, NHS staff and the volunteers themselves. This will in part be achieved by supporting Boards to make use of nationally recognised standards in volunteer development including the Investing in Volunteers quality standard and the National Occupational Standards in Volunteers Management.

9. As a priority over the summer of 2008 VDS will develop a guidance document which will include sample volunteering policy and procedures (to replace those issued with previous MELs) and will include examples of good practice and advice on the payment of travel expenses etc.

10. VDS will also support VSMs by reintroducing and facilitating regular networking opportunities to encourage sharing of ideas and good practice across Boards.

11. Ensuring the National Strategy is progressed efficiently and effectively will require co-operation and enthusiasm. Importantly the Strategy will be a living document, which will be reviewed, monitored and where necessary altered as learning about volunteering is developed and strengthened. The National Action Group will produce a progress report annually identifying any alterations to planned work, any new areas of work or recommendations and will distribute this appropriately.

Action Plan

12. The proposed plan, which will be supported over the next three years by VDS, is attached as Appendix A.

13. Voluntary Organisations that are contracted by the NHS, and which involve volunteers in service delivery, are not required by this strategy to achieve the

Investors in Volunteers standard by 31 March 2011. However, Boards should try to ensure that the practices of all of the voluntary organisations which deliver services for the NHS are in the spirit of the standard. The National Action Group will consider the position of such voluntary organisations further in consultation with Boards and with voluntary sector representatives.

Further Information

14. Background and additional information is given in Appendix B. A dedicated website section has been set up at: www.scotland.gsi.gov.uk/Topics/Health/NHS-Scotland/Boards/VolunteeringStrategy and currently includes:

- The Investing in Volunteers Standard
- Information on:
 - The National Occupational Standards in Managing Volunteers
 - The Volunteering Impact Assessment Toolkit
 - Section 16B Grant scheme
 - Statutory Provisions

Papers and guidance on the various areas identified in the Action Plan will be added to the Scottish Government website as they become available.

Further Assistance

15. Further assistance is available from VDS, in the form of publications, contact lists, advice on policy development and implementation, consultancy services and training courses. Contact details are given in the covering letter.

Patients and Quality Division
February 2008

Refreshed National Strategy Action Plan

2008/09			
Theme	Task	Responsibility/Delivery	Timescale
Investing in Volunteers	2 NHS Boards will be supported by VDS to achieve the Investing in Volunteers Standard	Individual Boards supported by Volunteer Development Scotland (VDS)	By 31 March 2009
Investing in Volunteers	VDS will provide support to NHS Boards on how to achieve Investing in Volunteers	Individual Boards supported by VDS	Throughout 3 years of the Strategy
Ensuring Effective Leadership in Volunteering	(i) VDS will establish a national group to provide leadership and drive in implementing the strategy.	VDS will provide secretariat support for the Group and support its work.	By April 2008
	(ii) The National Group to agree with the Directorate of Health and Wellbeing the timescale/format for reporting on an annual basis to the Minister for Public Health.	National Group, VDS and Directorate of Health and Wellbeing	By June 2008
Ensuring Effective Leadership in Volunteering	(i) Each NHS Board to appoint and advise VDS of a designated person who will lead on volunteering within their area;	Individual Boards	End April 2008
	(ii) Each Board to provide VDS with contact details of all Volunteer Support Managers (VSMs) within their area.	Individual Boards	End April 2008

2008/09			
Theme	Task	Responsibility/Delivery	Timescale
Ensuring Effective Leadership in Volunteering	Each NHS Board to consider how to best to provide leadership at local level for ensuring implementation of its strategy on volunteering and put agreed arrangements into place	Individual Boards	By March 2009
Planning for continuous improvement in volunteering management	(i) NHS Boards in partnership with appropriate external organisations to produce their own strategic action plan for volunteering. (ii) Report progress within the Annual Review and self assessment process, as part of Boards performance on PFPI responsibilities.	Individual Boards/supported by VDS Individual Boards/Scottish Health Council	By end March 2009 for implementation between 1 April 2009 and 31 March 2011. In line with targets set by the Scottish Health Council and Annual review process.
Positive and Consistent Environment for Volunteering	To provide Guidance on Employer Supported Volunteering Policy to NHS Boards.	The National Group/ VDS	By 31 March 2009
Positive and Consistent Environment for Volunteering	(i) Ensure that all NHS staff who manage/ support volunteers can access on line learning on good practice in volunteer management which complies with the National Occupational Standards on Managing Volunteers; (ii) Support VSMS by reintroducing and facilitating regular networking opportunities to encourage sharing of ideas and good practice across NHS Boards.	VDS and NHS Education Scotland VDS	By 30 October 2008 By 31 August 2008

2008/09			
Theme	Task	Responsibility/Delivery	Timescale
Developing a more robust infrastructure for volunteering and better partnerships	Boards to enter into discussions with appropriate local bodies, including volunteer centres, to agree arrangements for the effective: <ul style="list-style-type: none"> • signposting and referral of prospective volunteers from the volunteer centre, and others, to the NHS; and • referral of patients/ ex patients as prospective volunteers to volunteer centres. 	Individual Boards	Arrangements agreed by 31 March 2009
Developing a more robust infrastructure for volunteering and better partnerships	NHS Boards to consider use of the volunteerscotland website to advertise its volunteer opportunities	Individual Boards to initiate discussion with local volunteer centres	By 31 March 2009
Broadening the diversity of people involved as volunteers	Recommendations are produced, in conjunction with key national partners, on how to support joined up and co-ordinated action to dismantle barriers to volunteering.	National Action Group/ VDS produce recommendation/action for Boards	By December 2008

2008/09			
Theme	Task	Responsibility/Delivery	Timescale
Measure the impacts and sharing learning / good practice	(i) Piloting of the Volunteering Impact Assessment Toolkit in 5 NHS settings and results shared with rest of NHS	VDS	Completed by June 2008
Measure the impacts and sharing learning / good practice	(ii) arrange 4 Roadshows across Scotland to share results of Volunteering Impact assessment pilot;	VDS	In Autumn 2008
	(iii) Support use within NHS Scotland of Volunteering Impact Assessment Toolkit.	VDS	Throughout term of strategy.
Measure the impacts and sharing learning/ good practice	Produce guidance for NHS Boards on the payment of out of pocket expenses for volunteers.	National Group supported by VDS	By June 2008
Measure the impacts and sharing learning/ good practice	Identify a baseline for volunteering in the NHS, improve data collection on volunteering and produce report and recommendations.	VDS/ National Group in consultation with NHS Boards	By January 2009
Measure the impacts and sharing learning/ good practice	Development of key guidance and practice materials/case studies on how volunteering can work in various health care settings are produced and made available via the web.	National Group/VDS	Ongoing across the strategy

2009/10			
Theme	Task	Responsibility/Delivery	Timescale
Investing in Volunteers	7 NHS Boards will be supported by VDS to achieve Investing in Volunteers standard.	Individual Boards supported by VDS	By 31 March 2010
Planning for continuous improvement in volunteering management	Annual review of progress of Boards' strategic action plans for volunteering.	NHS Board lead on volunteering	Within 3 months of each year end
Planning for continuous improvement in volunteering management	Report on progress of strategic action plan within the Annual Review and self assessment process, as part of Boards performance on PFPI responsibilities	Individual NHS Boards/Scottish Health Council	In line with targets set by the Scottish Health Council and Annual review process.
Planning for continuous improvement in volunteering management	Board to consider incorporation of its strategy on volunteering within the appropriate Community Plan(s).	Individual Boards	By 31 March 2010
Planning for continuous improvement in volunteering	All Boards to have an employer supported volunteering policy in place as part of existing Human Resources Policy or as a stand-alone policy.	Individual Boards.	Policy in place by 31 March 2010

2009/10			
Theme	Task	Responsibility/Delivery	Timescale
management			
Measure the impacts and sharing learning / good practice	Provision of support within 3 NHS settings in the use of the Volunteering Impact Assessment Toolkit in the NHS.	Support provided by VDS	BY 31 March 2010
Measure the impacts and sharing learning / good practice	Development of key guidance and practice materials/case studies on how volunteering can work in various health care settings are produced and made available via the web	National Group/VDS	Ongoing across the strategy

2010/11			
Theme	Task	Responsibility/Delivery	Timescale
Investing in Volunteers	Support for remaining NHS Boards to achieve Investing in Volunteers standard	Individual Boards supported by VDS	BY 31 March 2010
Planning for continuous improvement in volunteering management	Annual review of progress of Boards' strategic action plans for volunteering.	NHS Board lead on volunteering	Within 3 months of each year end
Planning for continuous improvement in volunteering management	Board examines, with other Community Planning partners, the need for a generic strategy for volunteering in the area.	Community Planning Partnerships	By 31 March 2011
Measure the impacts and sharing learning / good practice	Use of the Volunteering Impact Assessment Toolkit in the NHS is supported	Support provided by VDS	2 NHS settings supported in 2010/11
Investing in Volunteers	Support is available to Boards on how to achieve Investing in Volunteers	Support by VDS	Support delivered through out the Strategy
Measure the impacts and sharing learning / good practice	Development of key guidance and practice materials/case studies on how volunteering can work in various health care settings are produced and made available via the web	National Group/VDS	Ongoing across the strategy

STRATEGY FOR VOLUNTEERING IN THE NHS IN SCOTLAND

Background

Volunteering in the NHS in Scotland

1. Citizens volunteering in health care pre-date our NHS. Today it is estimated that many thousands of people give freely of their time either directly to our NHS or indirectly through organisations such as WRVS and the Red Cross. They are active in many different healthcare settings, including hospitals and perform a variety of roles. Volunteers help to deliver services in Scotland's NHS and they help to shape the way in which those services are delivered. They work side by side with paid medical staff, nursing staff and allied health professionals, complementing, not replacing, their work and adding value to it.

Benefits realised through volunteering

2. Volunteering brings a wide range of benefits to patients, carers, service users, Scotland's NHS and its staff and to the volunteers themselves. For patients/ service users, volunteers can offer social support, experience, time and attention. For Scotland's NHS and its staff, volunteers can help to free up professional resources and forge stronger links with local communities. For volunteers the experience can provide purposeful activity, a sense of belonging, social interaction and be good for their own health and well being.

Definitions

3. For the purposes of this document:

A **volunteer** is:

“A person who gives freely and willingly of their time to help improve the health and wellbeing of patients, users (and their families and carers) of the NHS in Scotland.”

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

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

Developments since previous guidance

4. MEL (1998)⁴² required Health Boards to draw up a policy statement on volunteering in their area, and to co-ordinate, monitor and support the development of these services. NHS MEL (2000)⁴ provided sample Policy and Procedures on Volunteering as an aid to assist Boards to put in place and implement their own policies.

5. Since the publication of the Directives, there has been major change in the structure of the NHS in Scotland and the policy context for health and volunteering. Major relevant changes include:

- The rationalisation of area NHS Boards and Trusts in to a single unified Board structure (*Our National Health*, 2001);
- The development of the *Patient Focus and Public Involvement* agenda (2001);
- The publication of the Scottish Executive's *Volunteering Strategy* (2004)

6. The recommendation in the Kerr report (*Building a Health Service Fit for the Future*, 2005) that "each NHS Board develops proposals to enhance volunteering in line with the principles set out in the Scottish Executive's *Volunteering Strategy*".

7. VDS (VDS) were commissioned in early 2007 by the then Scottish Executive Health Department to make proposals, recommendations on how best to take forward volunteering in Scotland's NHS and to update the previous guidance on volunteering.

8. VDS took a evidence based and consultative approach with a variety of stakeholders which included volunteers, voluntary organisations, NHS Directors with responsibilities for volunteering, NHS Voluntary Services Managers and Scotland's local Volunteer Centres. Guidance was also provided through a specially convened Reference Group whose membership included two geographical Boards (Lothian and Highland), NHS Health Scotland, NHS Quality Improvement Scotland, NHS Education, Citizens Advice Scotland, Scottish Health Council, Scottish Council Foundation, and the Scottish Executive.

9. All stakeholders spoke positively about volunteering but most felt that more could be done to, improve; policy guidance recognition of peoples efforts (both by volunteers and also staff), volunteers and information management, develop and celebrate volunteering in Scotland's NHS.

10. Areas that were highlighted for attention included:

- inconsistencies in policies and practices between NHS Boards;
- inconsistencies in policies and practices between NHS Boards and the organisations contracted by the Board to supply volunteers;
- a lack of strategic drive, leadership and planning;
- an over reliance on voluntary service managers posts (dealing with large agendas often with little managerial support);
- the need to broaden the range of people involved as volunteers;
- the need to develop more partnership working, and
- an ad hoc approach to information management, monitoring, evaluation and impact.

11. Based on what stakeholders said VDS has recommended that the aim of future work should be:

"To maximise the benefits volunteers bring to improving the health and wellbeing of Scotland's NHS patients and users by supporting Scotland's NHS to build on current success and for it to become an excellent engager of volunteers."