



# Volunteer Handbook of Good Practice

**Part 1 Revised December 2019**

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## **1. Introduction**

Maintaining the values and ethos of the Trust is essential to us providing excellent service and to sustaining the service.

Our volunteers are not just gifted individuals but trained and continuously developing members of the Trust, sharing experiences, support and accountability to the volunteer body and to the Trust.

Within the boundaries set by the Trust's Policies, honesty and appropriate self-disclosure are vital to mutual learning and continuous development.

The Trust recognises that supporting the emotional and practical needs of each client, carer or other family member can be complex as each may have different and sometimes conflicting needs and each must be respected.

Our services are intended to meet the needs of the individuals we support and presently comprise:

- Emotional Support
- Short breaks for Carers
- Practical Help
- Bereavement Support
- Signposting & Referral

The Trust further recognises its responsibility to provide an equal access to all potential clients/carers across our whole service area and we will work with our Volunteers to fulfil this responsibility.

The Trust's commitment to continuous development and improvement extends to the services we offer. We are committed to improving our links, signposting and referral to other relevant organisations or groups.

Part 2 of your Handbook contains Brigitte Trust's Policies.

## **2. Volunteers**

### **2.1 The Role of the Volunteer**

Once trained a volunteer will be assigned to a client/carers by the Service Co-ordinator (SCO). Volunteers can discuss with the SCO their availability and what they are able to undertake and whether or not they can meet the needs of the Client, Carer and their family.

Volunteers are expected to provide a combination of emotional support and practical help according to the client/carers' needs and those of other family members. In all cases sensitively.

When disagreement or conflict occurs within a client, carer and family situation; volunteers must remain impartial and should seek advice from their SCO and through their Support Group.

To adhere to the Policies and Procedures of the Trust

Volunteers should not on any account use the time spent with client/carers to propagate their own spiritual feelings or beliefs. Volunteers should seek to assist clients to discover or re-discover their own spiritual way, if this is what the client/carers wants to do.

As the Trust further develops its services volunteers will be given opportunities to provide alternative forms of support. Further training will, where needed be given.

## **2.2 Visits**

Volunteers will always contact a new client/carer within the timeframe agreed with the SCO. A new client/carer is only to be approached by a Volunteer after specific invitation by the SCO.

The volunteer will agree with the client/carer the timing and frequency of visits. Typically, this may be once a week. However, to address the evolving needs of the client/carer the service provided should be flexible and may require longer or shorter visits as appropriate.

Should the volunteer be unable to meet the client/carer's needs they should advise the SCO so that the SCO can consider how the needs may be met.

Where a situation or client/carer's needs change the volunteer should consult the SCO as soon as possible. Volunteers may also find it helpful to discuss changes at support group.

The Volunteer will recognise the importance of keeping to the agreed arrangements as far as possible. The client/carer as well as the SCO's need to be sure that the commitment from each volunteer can be relied upon.

If a volunteer is unable to carry out a scheduled visit she/he will with as much notice as possible, contact the client/carer and record the missed visit on their monthly client record form.

Volunteers are responsible for completing a client record form and sending to the SCO once a month to update them with the latest information regarding their work with their client/carer.

In the event of an unexpected or violent incident or matter of serious concern volunteers should contact their SCO or the Charity Manager as soon as possible and forward a signed and dated record of the incident to the SCO.

The Volunteer will at all times respect confidentiality of each individual within any family they are supporting

The Volunteer should not answer requests by the client/carer for information specifically related to health matters. The Volunteer will encourage the client/carer to refer to the appropriate medical professional.

## **3. Referrals**

The Trust has an open referral system, receiving referrals from:

- Hospices
- District Nurses
- Community Matrons
- General Practitioners
- Other Health Professionals
- Hospitals
- Social Workers
- Clients, their relatives or friends
- Other local voluntary sector organisations
- Churches and community groups

Referrals are made to the SCO either directly or via the office. We aim to make the first contact response to referrals within 24 hours to plan the SCO assessment visit and where agreed with the client/carer, place a volunteer as soon as possible. Urgent referrals will be given priority.

The SCO maintains a register of referrals

#### **4. Service Co-ordinator**

The role of the SCO is critical to the effective working of the service, and the support provided to clients/carers and volunteers.

An SCO may have had experience as a volunteer and has responsibility for referrals, assessments, reviews, monitoring the service, placing and supporting volunteers. They help also to raise the profile of the Trust in their areas through networking with professionals and other voluntary and community organisations. They liaise with the Volunteer and Training Manager regularly and update monthly.

##### **4.1 Summary of the Service Co-ordinators Tasks**

- maintain contact with the relevant member of the referring body e.g. Hospices, Community Matrons, District or specialist Nurses, Hospital specialist or discharge teams etc.
- assesses and reviews individual client/carer needs and preferences
- collects and assesses all the available information, including from all the relevant agencies, concerning potential areas of risk prior to visits.
- undertakes a risk assessment of the client/carer and their home, using the Risk Assessment Form. This assessment will include the following aspects:
  - Environment – location, security, access
  - Context – nature of the tasks, special circumstances
  - Individual/s concerned – indicators of potential or actual risk for client/carer or volunteer.
  - Client mobility
  - Additional risks presented in supporting client/carer outside the home
- matches the client/carer with the volunteers
- provides the first line of support for the volunteers
- collates and process records
- provides feedback to the volunteers
- provides feedback to Training & Support Manager on training needs and the volunteer's development
- quality Assurance (see 14 "A Working Partnership")
- ensures that the client/carer is informed about the role of the volunteer i.e. including issues around confidentiality and monthly support group.
- monitors and assesses the client/carer's needs and satisfaction with the service by follow up contact after the volunteer has visited twice, thereafter at 6 monthly intervals and after the volunteer has withdrawn from working with the client/carer.
- for longer-term clients the SCO will review their circumstances at regular intervals and in any event no longer than every 6 months. Should their needs for which the original referral was made have changed, the SCO will advise the volunteer on their changed condition and needs. On occasions we may withdraw our service. In these cases, the SCO will discuss possible withdrawal with the Volunteer and Training Manager and the volunteer regarding timely withdrawal for both client/carer and volunteer. Where appropriate the SCO will identify, signpost or refer the client/carer to other potential sources of help who may better meet their needs. The SCO will advise the client/carer, volunteer and Volunteer and Training Manager.
- provide information for quarterly statistics to the Charity Manager. This is collated from the monthly return/claim form from the volunteers and are essential in reporting to statutory and other commissioners and grant funders of the service
- participates in the training of new volunteers

#### **5. Confidentiality**

Client/carer confidentiality must be respected and maintained at all times. This is a legal obligation, essential to building trust in the relationship and to enable the client/carer to disclose.

Volunteers should make explicit any limitations on confidentiality in the event of the client disclosing harm to others or self, or where there are allegations of abuse (see Policies)

It is the responsibility of the SCO to ensure that the client/carer understands that the volunteer has regular support and that in that context they will be talking about the service they provide. The identity of clients/carers is maintained by use of first names only and care will be taken to avoid any detail which would either be inappropriate or identify the client/carer.

Volunteers must not discuss their client with family or friends. There are many formal opportunities within the Trust for volunteers to discuss their clients/carers in confidence. They are as follows:

- the SCO with whom the volunteer may discuss all aspects of working with the Client.
- support Groups where care will be taken to only include relevant material and protect the client/carer's or family's identity.
- with the Charity Manager

## **6. Procedures**

### **6.1 Personal Identification**

Volunteers are required to carry photo-card identification with them whilst visiting or working with clients/carers. This is in the form of a small plastic ID card, which is issued by Administration after the Volunteer has successfully completed the Induction Course.

Carrying the card at all times when providing support is essential to identifying you to others, particularly in cases of emergencies.

When a Volunteer takes on a referral they are briefed by the SCO and advised to arrange a short introductory visit with the client/carer to discuss arrangements for working together. The meeting is to give re-assurance to all parties; however, the volunteer should have sufficient flexibility of their time to cope with unexpected issues arising.

### **6.2 Guidelines for self-care when visiting a client/carer**

The guidance given here is a short summary to help you in your conduct when providing support and to highlight a number of areas.

The guidance is not a substitute for you fully familiarising yourself with the Trust's Policies. These set out the responsibilities of you and others working within the Trust and the procedures you must adhere to.

#### **6.2.1 Lone Working Policy**

Volunteers providing care when working alone may feel the risks to them are low, however it is important to stress that when something does go wrong the impact can be high with great distress to the person involved, their family, the client/carer we are supporting and to the Trust

In developing the Trust's Lone Working Policy, we draw, but not exclusively, upon guidance from the Suzy Lamplugh Foundation. The Policy is there for your protection.

Volunteers should at all times adhere to the procedures set out in the policy, being aware that the greatest risks may arise when:

- Visiting somewhere new
- Dropping your guard through the familiarity of visiting the same client/carer or place regularly

## **7. Record Keeping**

A written record should be made of every visit. The record of client visits should be completed and sent to the SCO within seven days following the end of each month. Records are kept safely in the office for seven years.

Volunteers are not to email personal information regarding their client/carer to their SCO or supervisor. Any document with personal information may be emailed using a secure, pass word protected system such as Egress.

Volunteers are encouraged to keep personal process notes of their visits but should not identify the client/carer in any way. These are only for the volunteers' own learning and development and can be used for support group purposes. They should be shredded when the work is completed.

Volunteers should inform their SCO if there is any change in their client's risk assessment form, e.g. mobility.

Please refer also to the Record Keeping Policy

### **7.1 Personal Contact Details**

In the interests of personal safety, volunteers are advised not to disclose their personal address to clients/carers. The Brigitte Trust is the contact address.

The volunteer's telephone number may not be given to the client/carer initially; it is at the volunteer's discretion after meeting the client/carer whether to disclose it. Normally it is suggested that just a mobile telephone number be given. This saves the client having to leave messages with other members of the volunteer's family or on home answering machines.

### **7.2 Emergency Telephone Numbers**

If a Volunteer is sitting with a client whilst the carer is out it is essential that the volunteer has emergency contact details, such as the carer's mobile phone number, next of kin, family member, family friend or neighbour, GP etc.

Mobile telephones should be kept on silent or vibrate and not on ring tone during a visit to a client/carer or any Brigitte Trust group activity, unless specifically requested and agreed before the meeting.

### **7.3 Availability**

#### **7.3.1 General Availability**

The Trust values that many of its volunteers have worked with the charity for many years.

We hope that new volunteers may remain regularly active within the Trust for at least 2 years after completion of their initial induction and training and to be able to offer a minimum of 3 hours per week for client/carer' visits. In addition, time will be needed for travel, filling in their visit return. There is also time needed for updating their SCO on their client work and monthly support groups which is mandatory. It is also offered that volunteers can attend workshops for self-development and support.

You may support one or more clients/carers subject to your availability and in agreement with the SCO.

The Trust has a responsibility within its capacity to support all of the client's/carers in its catchment area that may be referred to it and whose needs have been assessed, also to provide equality of access. In order to fulfil these responsibilities, we anticipate volunteers will only exceptionally and with good reason turn down a placement with a client/carer. SCO will take account of such identified issues in offering placements e.g. travel time, fear of or allergy with pets, etc.

Brigitte Trust's volunteers often volunteer to support other activities in the Trust, such as promoting the service, administration or fund raising. This additional help is also much valued.

### **7.3.2 Holidays**

Volunteers should inform their SCO of their holidays, with as much notice as possible and normally with a minimum of 4 weeks. The SCO will endeavour to find a temporary volunteer for the client/carer if necessary and with the client/carers agreement.

Volunteers are also asked to inform the Volunteer and Training Manager if they are on holiday and unable to attend their Support Group. The expectation is that they attend another group that does not clash with their holiday dates.

### **7.3.3 Sickness or Other Absence**

If a volunteer is ill or for other reasons is unable to visit the client/carer they are expected to inform both their client/carer and their SCO.

Particular care needs to be given if a client is vulnerable to infection e.g. during chemotherapy, where, subject to client/carer agreement and depending on the length of time the volunteer is likely to be absent the SCO may endeavour to find a temporary volunteer,

Volunteers are also asked to inform their Volunteer and Training Manager if they are unable to attend their monthly Supervision Group for any other reason. The volunteer is expected to attend another Support Group that month.

## **7.4 Client Medication**

The Brigitte Trust policy is that volunteers do not administer medication to their Client. Whenever possible the client should take responsibility for administering their own medication.

Giving medication is a regulated activity which those within the Trust are not permitted to carry out.

Volunteers must be familiar with and understand the Trust's current Medication policy prior to providing support.

There may however be exceptional one-off circumstances when it is necessary for a Volunteer to assist a client with their medication. Under these circumstances and in order to protect the users of the service and to minimise risk, it is important that the volunteer adheres to the following guidelines:

- The volunteer must discuss with the prime carer the details of medication.
- If the client is on their own, the volunteer must discuss details with the District Nurse, GP or pharmacist.
- In each of these circumstances volunteer must record the detail on their visit form.

The Volunteer should not in any circumstance regularly assist or administer medication. They must advise the SCO who will decide the appropriate action and record it on the client record.

## **7.5 Suicide risk**

The volunteer should be aware of any suicidal indications or problems and should discuss these with their SCO. It is an occasion when confidentiality is broken if the client is at risk.

## **7.6 First Aid**

Volunteers are encouraged to attend First Aid Training provided by recognised organisations e.g. Surrey Community Action, British Red Cross or St. John Ambulance. First Aid Training certificates are valid only for a limited period.

Volunteers and SCO should always clarify with the client/carer and relevant medical personnel what should be done in the event of a medical crisis with a client.

See also the Health and Safety Policy

### **7.7 Health and Personal Hygiene**

Volunteers:

- need to act responsibly if they know they have potential to pass on any risk of infection
- are not allowed to cook food for their client but can serve food supplied by the client/carer, e.g. sandwiches. The volunteer must ensure that the highest standards of hygiene are maintained
- should not prepare food in their own homes to take to the client/carer
- should at all times adopt universal hygiene standards (See Universal Hygiene Policy)

For more information on handling of food see the Food Safety Policy

### **7.8 Manual Handling Guidelines**

The Brigitte Trust operates a “no lifting and handling” policy, which in practice means that volunteers should not undertake any activity which involves physical strain or physical risk to themselves or the client.

- If a volunteer finds a client collapsed on the floor, they should never attempt to lift them but they should be made comfortable and an ambulance called. There may be some light handling-helping a client in a car for example.
- In assessing whether or not to undertake manual handling, volunteers must bear in mind that all manual handling carries some risk. If they believe that there may be any realistic chance of physical strain or risk they should not undertake the task.
- SCO will ensure that a Health and Safety Risk Assessment of the client’s mobility/needs are assessed at the initial meeting and if circumstances change will re-assess. SCO will ensure that the client/carer is aware of the manual handling policy and the volunteer can mention it when they meet for the first time if necessary.
- The legal definition of Manual Handling Operations is “any transporting or supporting of a load (including the lifting, putting down, pushing, pulling, carrying or moving thereof) by hand or by bodily force. (taken from the Manual Handling Regulations 1992).
- Volunteers should report any moving or handling incidents or issues to their SCO and discuss them in their Supervision Group. SCO and volunteers must keep a log of such incidents.
- In the event of injury as a result of lifting or handling it should be noted that it is likely a volunteer will not be covered by Brigitte Trust’s insurance policy.

### **7.9 Co-Working**

Sometimes the client/carer’s needs may be such that more than one volunteer is involved either simultaneously or in sequence. In this case volunteers may need to liaise with one another about practicalities, such as who is visiting when and in discussion with their SCO. However, they should maintain confidentiality over their work with the client and should not discuss it with the other volunteer/s.

Any information shared is on a “need to know” basis. Any questions on a “need to know basis” should be referred to the SCO.

Two or more volunteers involved with the same client/carer should take their work to separate Support Groups. This should be discussed with the Volunteer and Training Manager if the volunteers are not already in separate groups.

### **7.10 Caring for Children**

Brigitte Trust services are intended to support adult clients/carers, as a consequence of doing so we may support children who are family members. Where we do support children the additional risks must be

assessed by the SCO, the arrangements for looking after the child/children must be recorded in the client record and a client/carer consent form signed.

- When a volunteer is asked to collect or support a child (under 18yrs) without a parent or carer being present, they should ensure that there is a signed consent form in place. Consent forms are available from the SCO. The completed form must be returned to the SCO.
- Similar safeguards should be in place if a volunteer is asked to care for a child or take them out, including the assessments of additional risks of supporting the child outside the home
- If the parent/carer is absent when the call is made, leave some means of identification and explanation for the visit that can be given to them if the child is home alone or with other children
- Volunteers must not leave a child with an adult other than the parent, carer or known family household adult member unless that person is identified on the consent form
- Volunteers must not leave a child with another child (under 18 years)

There are strict rules over the transporting of children that must be fully complied with. These are set-out in the Driving Policy and summarised on the reverse side of the Consent Forms.

The SCO and Volunteer and Training Manager will discuss all new volunteer placements where volunteers are providing support with children and in particular consider the prior experience and training the volunteer has had and further training needs.

Volunteers supporting children should reference the sections of the Safeguarding Policies referring to supporting children and to the Child Absconding (or abducted) Policy.

#### **7.11 Receipt of Gifts**

Volunteers are not usually allowed to accept gifts from their clients/carers. Exceptions may occasionally be relevant and accepted provided the gift is of minimal value. This can be discussed with the Volunteer and Training Manager

In the event of a client/carer wishing to make a donation to The Brigitte Trust, then it should be sent directly to the Office. If the client/carer wishes to donate cash via the volunteer, the money should be put in a sealed envelope with the client's signature and the amount. A thank you letter will be issued by the Promotions Manager.

#### **7.12 The Handling of Client's Money and Financial Affairs**

Volunteers should not become involved in managing or handling the financial affairs of clients/carers. Any request to do so should be referred to the SCO.

Handling of client's/carer's money can, if not done properly, represent a significant risk to the volunteer and the charity.

Wherever possible it is best not to handle a client's/carer's money. The trust's recognises that in rare cases it may be necessary for volunteers to handle client's/carers money and sets out the procedures for doing so in The Handling of Client's Money and Financial Affairs Policy.

#### **7.13 Procedure after Ending with a Client/Carer**

After the death of a client, or withdrawal for any reason, the SCO will discuss with the volunteer bringing work with the family to an appropriate end with bereavement support being offered for up to 6 months. This can also be discussed in support group.

The Trust expects that there will be no further contact between volunteers and clients/carers after withdrawal and definitely none initiated by the volunteer. The volunteer's feelings after withdrawal should

be shared in Support Group. It is recognised that the separation process can be difficult where close bonds were formed and where necessary additional one to one support of the volunteer will be provided.

## **8 Support for the volunteer**

### **8.1 On-going Training and Support**

On-going training and support is provided for all volunteers in the following ways:

- Telephone support from the SCO monthly or as needed
- Monthly Support Group: Regular attendance is required while supporting a client/carer.
- On-going Professional Development such as workshops.
- Visits and outside speakers
- Time out, where appropriate, in consultation with the SCO
- Regular individual review of voluntary work is with the SCO and Volunteer and Training Manager. The aim is to consider the development of skills and training needs to support the Volunteer in their work

### **8.2 Volunteer Support Groups**

Timetables for Support Groups are set at the beginning of each calendar year and volunteers are given a choice of days and times (either day or evening) Meetings may be held at the Trust's premises in Dorking and other external venues.

Attendance at the chosen Support Groups is required for all volunteers.

If a particular issue arises with a client/carer that necessitates additional or more frequent supervision this can be arranged between the Volunteer and Training Manager and volunteer. If unable to attend their normal group for any reason it is the Volunteers' responsibility to notify the Volunteer Manager and find an alternative session to attend.

Attendance is required for the full duration of the Support Group session. Valuable learning comes from the understanding of the problems and ways of working from other Volunteers. A group where all remain fully engaged and paying good attention until the end of the session is a great source of support.

Each volunteer will be expected to recall and understand more deeply the full effect that a visit has made on her/him, with an explanation of the feelings experienced at the time of visiting. The groups are an opportunity for the volunteers to discuss and reflect on how they can improve the help and support that they are offering to their clients/carers. Volunteers may contact the Volunteer Manager outside the group if necessary.

Volunteers are required to continue to attend support group after ending work with a client/carer whether this is a result of a death or after withdrawal for other reasons. The needs of the Volunteer to process the ending with a previous client/carer will be taken account of when requesting they work with a new or additional client/carer.

Volunteers are expected to provide regular weekly support normally 3 hours (plus travel) for a minimum of one client/carer. As the service provided is determined by the needs of the client/carer visits are flexible and may be longer, shorter, more or less frequent.

Volunteers may be asked to take on a second client if it is agreed with both the SCO and the volunteer that they have the time and capacity to do so within it impacting on the existing placement

Unavoidable absence from Support Groups, Workshops, or meetings should be reported to the Volunteer and Training Manager with as much notice as possible

### **8.3 On-going Training Workshops**

Workshops are organised by the Volunteer and Training Manager in consultation with SCO, volunteers and other Trust staff. Volunteers are consulted regularly as to their needs and for suggestions of topics which they would like to have covered.

The programme over the year will try to cover a range of topics which are interesting and relevant to the development of the volunteers' skills, to their personal development needs and to offer relevant information within the field of end of life care or palliative care.

Volunteers are asked to complete an evaluation form at the end of each Workshop to enable the Trust to assess the value of the Workshop and the learning of the course facilitators

### **8.4 Time Out**

Volunteers should discuss with their SCO/Volunteer Manager when they are not available to work in order to ensure continuity of service.

Volunteers must inform the SCO or Volunteer Manager of any personal bereavement, loss, serious illness or any other significant change in their personal circumstances. Volunteers may be asked to withdraw from active work with the Trust for an appropriate period of time in order to deal with the personal event. This will be because the volunteer's own needs may make it inappropriate to continue working with the client/carer; perhaps because the volunteer needs the time and energy for personal use and perhaps because the client's/carer's needs conflict with those of the volunteer. During this period of time the volunteer is encouraged to keep in contact with the SCO and receive support from the Trust.

After 3 months the volunteer should discuss with the Volunteer and Training Manager whether or not it is time to return to volunteering although time out may be extended to one year. If a longer break is needed the Volunteer and Training Manager may ask the volunteer to attend some further training sessions as a refresher course in order to facilitate a return to work.

## **9 Quality Assurance**

### **9.1 Commitment to Quality**

The Brigitte Trust is committed to provide high quality services to those with life threatening conditions, their carers and other family members and to maintain high standards in all our work with other organisations or individuals.

We define a high quality service as one that:

- understands the needs and wishes of those we support
- responds to those needs and wishes or signposts or refers them in order their needs are met
- responds flexibly to the individual needs and wishes of those with life threatening conditions, their carers and other family members and respects that on occasion, their needs and wishes may be different
- responds in a timely manner.
- respects independence, choice and control and the capacity of clients to make their own decisions (Mental Capacity Act)
- respects the religious beliefs, culture or orientation of individuals
- embraces equality and diversity, including that by association
- provides equality of access
- identifies and appropriately mitigates risks
- recognises safeguarding as a priority that cannot be compromised.
- welcomes and values feedback from clients, carers and their families and other stakeholders
- uses feedback to further improve our service
- ensures all complaints are fully investigated, responded and learned from
- is committed to continuously enhancing and improving our service

- recognises quality is the business of us all; all of the time
- values the contribution of team members and the importance of working as a team.
- maintains the values of the organisation

To achieve high standards, we will:

- listen to Clients/Carers and other stakeholders
- invest in the induction, training and support of our volunteers, employees and Trustees.
- where appropriate deliver to accredited or recognised standards, where the standards improve the quality or add value to the service.

Within the Trust's Quality Policy (see for further information) the responsibilities of all those working within the Trust are set out.

Volunteers are responsible for:

- attending the planned programme of induction, training and supervision.
- maintaining regular monthly contact with the SCO.
- reporting to SCO any changes in the needs and wishes of those we support and any concerns they may have.
- reporting to SCO immediately and without making judgements any concerns over safeguarding, abuse or harassment. In the event SCO IS not available to report to the Volunteer and Training Manager or Charity Manager.

#### **10. Disclosure & Barring Service (DBS checks)**

At commencement volunteers are required to undergo a DBS check. This will be an Enhanced Disclosure as Volunteers may be in direct contact with children (under 18yrs) or with vulnerable adults.

The Training & Support Manager and Administrator will ensure that this procedure is carried out during volunteer training so that volunteers can be placed with clients/carers as soon as possible on completion of their training.

The Trust maintains a Secure Storage, Handling, Use, Retention and Disposal of Disclosures and Disclosures Information Policy in line with current guidance

#### **11. Probationary Period**

All Volunteers have a probationary period for their first year after completing their Induction Training. During this period, they are expected to show ability to commitment to:

- provide regular and flexible emotional support and practical help meeting their client/carer's needs and reflecting the high standards and values of the Trust
- work to Brigitte Trust Policies and the Good Practice standards and guidance
- attend regular Support Groups
- attended Volunteer Workshops

At the end of the probationary year a review of the volunteer's work will take place on the basis of self-evaluation, feedback from the SCO and an interview with the Volunteer and Training Manager.

#### **12. Administration**

##### **12.1 Insurance**

The Trust maintains appropriate Employer (including Volunteers) and Public Liability Insurance

##### **12.2 Driving Licence, Car Insurance & MOT Certificate**

Volunteers are required to:

- produce a valid UK driving licence and to report any amendments thereafter e.g. convictions or loss of licence.
- evidence that they carry motor vehicle insurance for business use and to confirm the cover and a current MOT (if vehicle over 3 years old) when signing their monthly expense form
- complete a car insurance form at the end of the training course

### 12.3. Expenses

A mileage allowance is payable to those using their vehicles to visit or transport clients/carers and attend support group or training. The appropriate form is available on-line (see example in appendices) and from the office. The form needs to be completed and sent to the SCO by the 7<sup>th</sup> of each month for authorisation. Volunteers may choose not to claim expenses and can donate them all or in part to the Trust. They should complete the form and indicate where appropriate their donation. Donated expenses can be Gift Aided if the Volunteer is a UK taxpayer. Forms are available from the Administrator. The Trust thanks volunteers for their support.

As some volunteers' mileage costs are met by grant funders through restricted grants, it is important that each volunteer makes their claim each month even where they wish to donate. Failure to do so on time will often result in a loss of that money to the charity.

Expenses are paid electronically to your nominated account.

### 12.4. Transporting Clients

Volunteers should carry disposable gloves in the car. It is also helpful to carry a blanket, cushion and an appropriate receptacle in case of sickness.

In the event of a client being oxygen dependent and travelling in the volunteer's car, a hazard sticker should be clearly displayed in the vehicle. An appropriate sign for display is available from the office.

Volunteers should not travel as passengers in the client's/carer's car.

Please refer also to the Driving Policy

## 13. Complaints

The Brigitte Trust operates a complaints procedure and it is the responsibility of everyone in the Trust to ensure that any complaint is reported to the SCO, Volunteer and Training Manager and/or Charity Manager.

## 14. A Working Partnership between the Service Co-ordinator and Volunteers

SCO will support their Volunteers by:	Volunteers will support the SCO by:
providing first line telephone support and guidance to the volunteer	being flexible in supporting the needs of clients/carers
helping in the induction of newly trained volunteers	being constantly aware that each client/carer is unique and that their needs may change and reporting these changes to their SCO
arranging the most suitable matches of volunteers and clients/carers, taking into account clients/carers needs, The volunteers experience, availability and location	calling the SCO after their first visit to a new Client
discussing with the volunteer their suitability	sending completed 'Record of Client Visits' form to their SCO by the 7 <sup>th</sup> of the following month. This information is very important, and volunteers' prompt response is appreciated. The statistics gathered are required to

SCO will support their Volunteers by:	Volunteers will support the SCO by:
<p>and availability to support the client/carer</p> <p>being the first point of contact if the volunteer has a problem or concern and will always be willing to listen</p> <p>liaising with volunteer, Volunteer and Training Manager over the volunteer's progress, placements, time-outs and any other matters arising</p>	<p>ensure our funding from the NHS and our Grant funders continues and to provide information to help us better target our services to those most in need, in localities where people are not being reached well by our service those who are harder to reach e.g. isolation, deprivation, minorities or disabled</p> <p>sending expenses claim forms to their SCO by the 7<sup>th</sup> of the following month</p> <p>calling their SCO at least once a month to keep up to date with an understanding of the clients/carers changing needs, how well the support is working, any gaps in the support the client/carer wishes and how they are feeling about their work. The length of time a volunteer is alongside a Client can vary from weeks to months.</p> <p>advising their SCO if the client dies or there are any changes in circumstances e.g. admission to hospital, hospice, nursing home, and if there has been a significant change to the initial risk assessment form</p> <p>advising their SCO of holiday dates with as much notice as possible, normally at least 4 weeks</p> <p>advising their SCO if they are unwell or they are otherwise unable to make a visit</p>

## 16. Record Keeping

16.1 The Trust maintains Policies with respect to record keeping and is developing further Policies. It is important that volunteers familiarise themselves with these Policies. In particular but not exclusively:

- Record Keeping Policy
- Confidentiality Policy
- E Safety Policy

With regard to clients/carers we have 5 different kinds of records as follows:

- SCO Client Information Record
- Risk Assessment Form
- Consent Form
- Client Review Form
- Record of Client Visits

SCO and volunteers must always be aware that any record relating to the client/carer or other family member may be accessed by them.

### 16.2 Client Information Record (as above)

These records are to be completed by the SCO with the client's/carers knowledge and help. SCOs will securely retain the form for reference for the duration of work with that client, after which the record will

be transferred to the Office. Records will be kept in a secure filing cabinet for seven years. The purpose of this record is to collect information:

- To ensure the client/carer needs have been appropriately assessed and a service is provided to meet those needs
- For the SCO and volunteer to ensure effective communication.
- To evidence that the Trust complies with its obligations i.e. legal or guidance, agreed practice, insurance and reporting
- For the SCO to record ongoing contact with both the client and any health professionals or others, including signposting and referral during the time the client/carer is supported by the Trust

It is essential that the form is updated to take account of any change in the needs of the client/carer.

### **16.3 Risk Assessment Form (as above)**

This form is completed by the SCO, with the client/carer's knowledge. A copy is kept by the SCO and the volunteer. The purpose is to assess the client/carer's environment, context, history, check for indicators of potential or actual risk, in order to safeguard the client/carer and volunteer.

It is essential that the form is updated to take account of any change in the potential risks not taken account of during the initial Risk Assessment for example, but not exclusively, that may arise from:

- Supporting the client outside of the home
- Change in the client's condition
- Change in medication
- Transporting client/carer or other family member

The Risk Assessment form is returned with the Client Record Form to the office for secure keeping for 7 years.

### **16.4 Consent Form**

Is normally completed by the SCO with the client and carer to record the clients and carer consent, as appropriate, to:

- Information Sharing
- Key Safe Access
- Supporting Children

It is essential that the form is updated to take account of any change in the consents given by the client or carer. Each may withdraw consents or give additional consents at any time.

It is important to recognise that a person cannot give consent on behalf of another adult person where that person has capacity to give the consent.

As signing a general consent form, such as used by the Trust, cannot be regarded as a consent for extended periods of service or where significant issues arise, new Consent Forms must be obtained at reviews or where a significant issue arises.

Each Consent Form is returned with the Client Record form to the office for secure keeping for 7 years.

### **16.5 Client Review Form**

The Brigitte Trust service provided to a client/carer will be reviewed every 6 months or sooner if circumstances for the client/carer significantly change and a review is needed then.

The SCO will discuss the review process with the client/carer at the commencement of the service. The SCO will visit the client/carer to review the service. If this is not possible, the reason for the review being conducted in another way will be recorded on the form.

This form is completed by the SCO, with the client/carer's knowledge. A copy is kept by the SCO. The purpose is to review the service being provided to a client/carer, to see if it is still appropriately supporting the needs of the client/carer. Additional or different support may be required. It may be appropriate for the Brigitte Trust service to be withdrawn. If the client /carer needs remain and The Brigitte Trust can continue to resource that need, the service will continue. They should be returned to the office by the SCO for filing when the work with the client/carer has been completed.

#### **16.6 Record of Client Visits (as above)**

These should be completed by the volunteer for the duration of the work and sent to the SCO monthly. They should be returned to the office by the SCO for filing when the work with the client/carer has been completed.

They can be seen by SCO Volunteer and Training Manager and Charity Manager, and clients/carers and subject to consent and on a "need to know" basis (Brigitte Trust Policies) by the referring agencies on request. The request is subject to approval by the Service and Development Manager.

#### **17. Complaints**

A copy of the Complaints Procedure leaflet is provided by the SCO at the time of the assessment and a full copy of the Complaints and Compliments Policy is in Handbook 2

#### **18. Membership**

The Brigitte Trust is a membership organisation and welcomes volunteers as well as clients, carers, client family and professionals with whom we work to become members. Full details on Membership can be obtained from Administration.

## **Brigitte Trust Volunteer Support Group Guidelines**

### **The purposes of the support group are:**

- To provide a regular space for the volunteer to reflect upon both content and process within the work
- To have space to explore and express personal issues which may be brought up by the work
- To be validated and supported as a volunteer
- To develop understanding and skills within the work including the volunteer's role, boundaries and responsibilities
- To receive information and other perspectives on the work
- To receive feedback on content and process
- To ensure that the volunteers is not left to carry unnecessary difficulties and problems alone
- To plan and use personal and professional resources better and to use group reflection to practice use of appropriate communication skills.
- To be pro-active rather than reactive
- To ensure quality of work and to ensure that the volunteer understands and meets The Trust's objectives and standards

### **As a volunteer, I expect:**

- To be listened to
- To prepare for my support group, by bringing and using any notes I may have and by presenting my client work openly and honestly
- Space in which to discuss and reflect on my work with my client
- Reflection time before we move onto the next volunteer's client
- Help dealing with endings when difficult or unsatisfactory
- Acknowledgement if my needs cannot be met
- Confidential holding of the group – no discussions outside the room
- To have confidentiality according to the Trust's confidentiality policy
- Help when needed from Supervisors, Service Co-ordinators and BT as an organisation
- To be welcomed into another support group when I'm unable to attend my own

### **As a volunteer, I agree to:**

- Attend a support group once a month
- Prepare for my support group each month
- Participate in negotiating an agenda for the session
- Work within agreed limits
- To be committed to and involved in the process of the support group

**As a supervisor I expect:**

- To facilitate a safe group environment for effective support and development for all group members
- To use this environment to enable expression of feelings, and to monitor the health and emotional functioning of individual group members
- That volunteers will prepare for their support group
- Punctuality
- That volunteers will attend their support group every month and if for any reason the volunteer is unable to attend their group that month, that volunteer will inform the supervisor
- That the volunteer will attend another support group that month when unable to attend their own
- That a volunteer will consider their work commitment on a regular basis in their support group
- It will be acceptable to challenge and be challenged as well as work together on issues
- That work will be discussed within the framework of the organisation and allocated tasks will be completed
- To provide constructive feedback on all aspects of a volunteer's work
- A willingness to explore difficult feelings
- A volunteer to be able to own feelings of impotence and accept the "can't change" situation

**As a supervisor, I agree to:**

- Be involved in setting the agenda as well as doing the necessary thinking and preparation beforehand
- Facilitate and support the group session as well as provide individual and group support
- Provide clarity about the expectations of the organisation
- Provide a written record of the session

# THE BRIGITTE TRUST

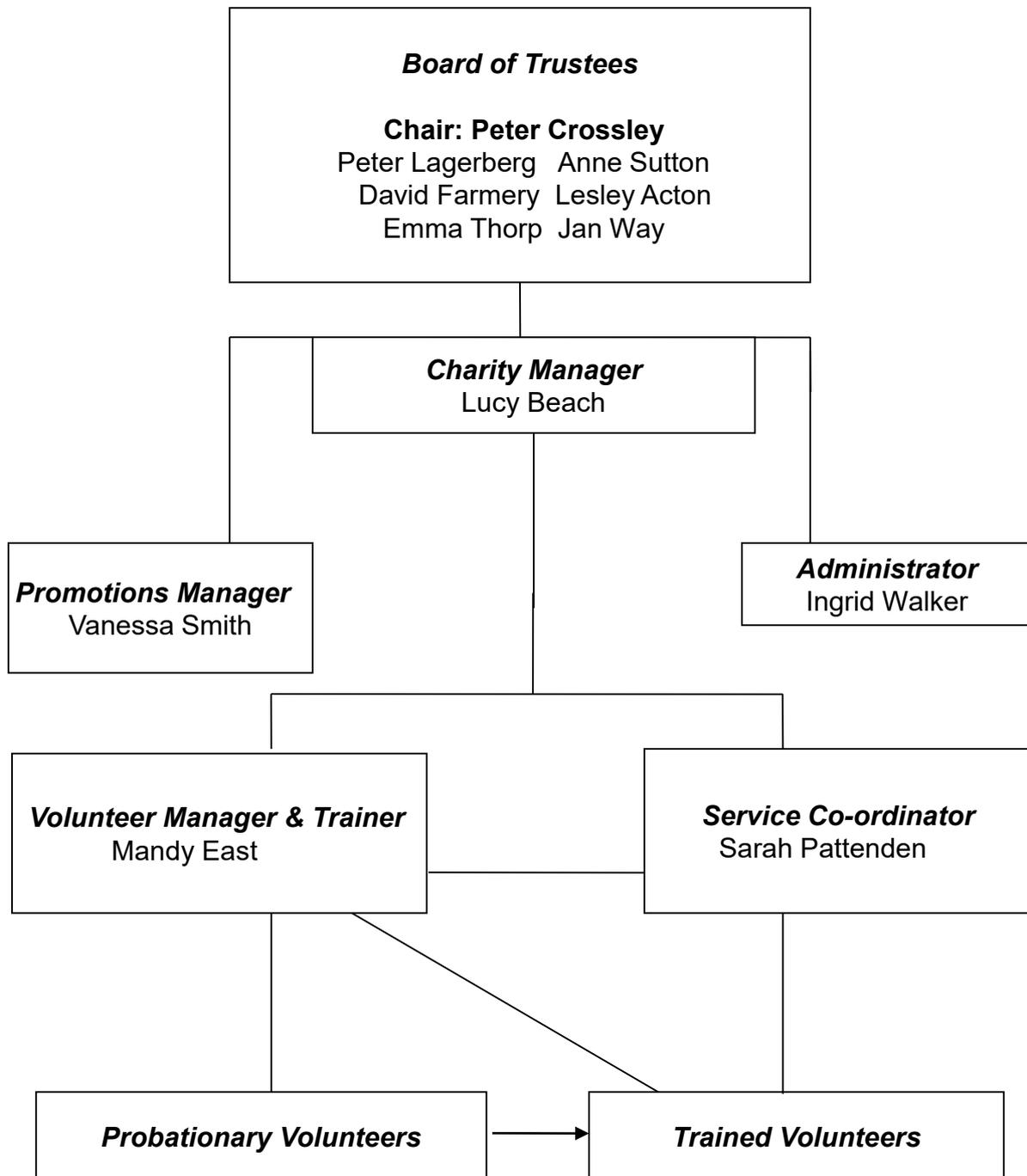
**The following are some useful notes on how to prepare for Volunteer Support Groups:**

1. In addition to the official record keeping, it might be helpful for you to keep notes for yourself after each visit, noticing your reactions, feelings and observations. These should be referred to in your Support Group (to be shredded once you have finished with your Client). Please use first names only.
2. Clarify with your group how many clients you are currently supporting
3. Think about what you would like from your Support Group. Every client's story is very important, however, due to time limitations within the group please focus on the issues you would like to discuss – for example:
  - a. How you feel about your work with your Client.
  - b. How you might improve the help and support you offer.
  - c. The thoughts and feelings you experience as you support your Client – many day-to-day details of the story won't be necessary to share
  - d. The thoughts and feelings you experience once you have completed your visit, and, ultimately when you have made an ending with your Client.
  - e. The concerns your Client may share with you – bearing in mind confidentiality
  - f. Any practical concerns on which you would like some advice
4. Remember to share the SCO's role in your work, and their thoughts and input. There may be relevant links between you, the SCO, Supervisor and Support Group.
5. Please talk about your Client after you have made an ending with them.

**If you are unable to attend your usual Support Group please ensure you inform your Supervisor. It is important you attend an alternative group. Please check with one of the other Supervisors that you may join their group for that month.**



# Organisation Chart





## THE BRIGITTE TRUST STAFF CONTACTS

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