

Wiltshire Link Schemes Good Practice Guide 2021 Edition:

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Volunteer Activity and Guidance

COMMUNITY
FIRST



About this Guide

This Guide has been produced by Community First. It is intended to be used by Wiltshire Link Schemes both in the set up phase and as an on-going reference. It is based on the experience of the Link Schemes themselves, current legislation, and advice from a number of agencies.

Please note this Good Practice Guide is for guidance only. Each Link Scheme must review and amend documents, information, processes and policies to match their circumstances and needs.

In general, this Guide assumes that a Link Scheme is a Registered Charity (which is the case for most Link Schemes). If your scheme is not a Registered Charity, then guidance is included in Information Guide B. Community First is aware that other legal arrangements exist and may be chosen by Link Schemes, such as charitable incorporated organisation, charitable company, unincorporated association or trust. Advice is available from the Charity Commission.

You will find '(L)' in various places throughout the Guide. This is designed to help Link Schemes and direct their attention to legal requirements. Where (L) appears at the head of a sub-section this indicates the following section covers some legal requirements. Where (L) appears next to one or two items in a section these items are particular legal requirements. Please be aware that these distinctions are not always straightforward, and that general good management is also a legal requirement of charitable status.

There are also funding requirements. These are the criteria set by the funders of the Wiltshire Link Schemes, and apply to the Annual Grants Programme and the Small Grants Fund. These criteria are set out in Information Guide G (Section 5). These may occasionally change, but full notification and support will be given to Wiltshire Link Schemes to meet any new requirements.

Whilst every effort has been made to ensure that information is accurate, this document is for guidance only and there is no assurance that it is a full statement of law. We do hope you find it useful, but no legal liability can be accepted by Community First or its employees.

Please check www.communityfirst.org.uk for updates and news.

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The Wiltshire Link Schemes Good Practice Guide 2021 is produced by Community First and replaces the previous (2016) Good Practice Guide.

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F1: Link Volunteer Role Description

Main Duties

To carry out tasks which could be expected of a good neighbour, at the request of the Link Co-ordinator. These requests will take into account the volunteer's availability and the services they are prepared to offer as in their application form.

A volunteer will be expected to do the following.

- Understand and operate according to the Link Mission Statement (L).
- Maintain client confidentiality at all times.
- Wear the Link identity badge.
- Display the Hospital Parking Card whenever appropriate.
- Hand donation envelopes to clients.
- Return donation envelopes as agreed.
- Submit expense claims regularly.
- Advise the Co-ordinator of dates when unavailable.
- Refer clients needing further help to the Co-ordinator.
- Report any concerns about clients to the Co-ordinator.
- Protect privacy by not disclosing their telephone number to clients unless previously agreed with the Co-ordinator.
- Be aware of health and safety in respect of themselves and the client.
- Be familiar with Link Scheme policies.
- Undertake a Disclosure and Barring Service check (L).
- Undertake training if appropriate.

F2: Link Volunteer Drivers (L)

The Link Scheme is grateful for the time volunteers give as drivers and hope that it is an enjoyable experience for them. The following guidelines are intended to promote the safety of Volunteer Drivers and clients.

Volunteers, driving, and their vehicles

- The Link Management Committee has a legal responsibility to ensure that vehicles used on Link journeys are safe and legal (L). Vehicles must have current MOT, tax and appropriate insurance, and the Volunteer Driver must have a current, valid, driver's licence.
- Volunteer Drivers should be made aware that they are required to confirm these details and happy to be contacted by a Committee Member to do so, on an annual basis. (L)
- MOT, tax and insurance checks can be made online using the Volunteer Drivers car registration number and vehicle make. It is important to ask the Volunteer Driver's permission to make these checks as if you do not have permission you may be in breach of section 55 of the data protection act 1998.
- Checking that a valid MOT and Vehicle Tax is in place can be made via: www.gov.uk/check-mot-status
- Checking insurance is in place can be made via www.ownvehicle.askmid.com
- Drivers licence checks including information about penalty points and disqualification can also be retrieved online but it is up to the volunteer driver to share their information electronically. They can do this through via www.gov.uk/view-driving-licence
- If a Volunteer Driver incurs any motoring convictions they must inform the Volunteer Recruitment and Support Officer. Any convictions acquired will be considered by the Management Committee and the

- suitability of the Volunteer Driver to continue will be assessed. (L)
- Volunteer Drivers are responsible for their own fitness to drive including their eyesight, and awareness of the effects of any medication they are taking, the effects of alcohol and tiredness (L).
- Community First strongly recommend volunteer drivers are asked to have a Drive Plus driving assessment (or equivalent) upon reaching 79 years old and then repeated every 3 years in line with the driving licence renewal. Community First also encourage all Link Schemes to discuss the subject of driving assessments with new and existing volunteer drivers of any age. A Drive Plus application form can be obtained via Community First or from the annex.
- Private cars are subject to legislation regarding smoking, and Link Volunteer Drivers must observe legislation regarding smoking in a car with anyone under 18 years. (L) The Management Committee should also request that clients' views are respected if the Link Volunteer Driver smokes. Clients wishing to smoke in a Volunteer Driver's vehicle should also ask the permission of the Volunteer Driver.
- All Volunteer Drivers and passengers should wear appropriate seat belts at all times. (L)
- Volunteer Drivers must comply with all driving legislation and the Highway Code. (L)
- The Royal Society for the Prevention of Accidents has produced a Volunteer Driver's Handbook available at www.rosipa.com.
- Each Link Scheme must have Public Liability insurance which protects both volunteers and clients. The main elements of the policy should include the following.
 - Cover to protect against responsibility for personal injury or damage to property due to negligence up to a maximum of five million pounds.
 - Personal Accident cover to benefit volunteers if they sustain an injury while engaged in Link Scheme activity. Full benefits would apply to anyone between the ages of 16 - 75 and reduced benefits to anyone between 75 and 85. The insurer should be informed if volunteers are over 85 years.
- This cover may vary from Scheme to Scheme. Details of the policy are usually available from the Treasurer. See Section I for more on insurance. (L, F)

Parking

- Community First has negotiated parking concessions for volunteers that change on a year to year basis. The Management Committee should ensure that the most recent 'Link Parking Guidelines' document is available to all Volunteer Drivers. It is available from Community First and can be found on the Wiltshire Link Scheme website.
- The Link Volunteer will be responsible for any parking fines incurred as a result of not following the Link Parking Guidelines.

Claiming Expenses

- Any mileage allowance received by Volunteer Drivers should be tax free, subject to HMRC limits. (L)
- Volunteer Drivers should ensure that they log their full mileage and time on their expense claim form. Travelling expenses are currently paid at rate of up to 45 pence per mile and Volunteer Drivers may also claim for other out of pocket expenses. (L)
- Expense claim forms should be submitted to the Treasurer by the end of each calendar month or in agreement with the treasurer.
- Donation envelopes should be handed in, unopened,

Insurance for Link Volunteer Drivers

- Volunteer Drivers should be strongly advised to inform their insurance company that they are using their vehicle as a volunteer driver. The Link Scheme should provide the Link Volunteer Driver with a list of insurance companies which are committed to supporting Volunteer Drivers by not raising premiums as a consequence of volunteer driving activities. Information regarding companies who sign up to the Association of British Insurers Volunteer Driving – the motor insurance commitment - can be found at www.abi.org.uk

to the Treasurer at the same time as expense claims.

- The Treasurer will arrange payment and provide a fresh claim form and more donation envelopes.

Booking a Journey: Example of how the System could Work

- When a client calls for help, the following procedure is followed.
- The Co-ordinator checks the volunteer records to find:
 - The volunteer nearest to the client or most suited to the task, and
 - Whether the volunteer can undertake the task.
- The Co-ordinator rings the volunteer to check on availability and to give the client's location.
- If the volunteer is available, the Co-ordinator logs the details of the task and rings the client to confirm acceptance, give details of which volunteer to expect, and to explain the donation system.
- The volunteer arrives at the requested time at the client's home.
- At the conclusion of the task the volunteer offers the client a donation envelope. This should be sealed in the presence of the client.
- If the client asks for a 'follow-on' task to be done this should be booked through the Co-ordinator. For insurance reasons it is important that all tasks are logged.

F3: Non-driving Link Volunteers

The Link Scheme is grateful for the time non-driving volunteers give and hope that it is an enjoyable experience for them. The following guidelines are intended to promote the safety of non-driving volunteers and clients.

For volunteers undertaking non-driving tasks it is extremely important that they are made aware of boundaries from the outset. This forms an important part of the risk management process. It is good practice to have a clear and consistent written document outlining the 'do's and 'don'ts' of the volunteer roles they are undertaking.

Some suggestions around 'dos' and 'don'ts' for befriending and the 'good neighbour role' are given below.

Do

- Be prepared to listen and let the client talk.
- Observe confidentiality at all times but if a client asks you to keep something confidential tell them that if it causes you concern you will inform the Link Co-ordinator.
- Let the Link Co-ordinator know if you have to cancel

a visit.

- Keep to set days and times for visits unless discussed with the Link Co-ordinator.
- Be helpful and sensitive.
- Leave immediately if you feel unsafe or uncomfortable and inform the Link Co-ordinator.
- Inform the Link Co-ordinator of any concerns or incidents such as regarding behaviours or deteriorating health.
- Respect the client as an individual.
- Keep any dogs on a lead
- Follow safety guidelines when using power tools and preferably use the volunteers own tools.
- Keep a record on any accidents in an accident book

Don't

- Accept gifts from clients.
- Open or administer medication.
- Undertake any form of personal care e.g. toileting, washing, dressing.

- Perform any tasks that you do not feel comfortable with and never do tasks that require a professional tradesperson.
- Lift or move heavy objects.
- Become involved in family disputes or personal affairs.
- Enforce religious or political opinions on a client.
- Give personal contact details to the client unless discussed first with the Link Co-ordinator.

These lists are not exhaustive and will depend on the task undertaken by the Link Volunteer and the Link Scheme involved.

Simple risk assessment of good neighbour tasks

It is advisable that Link Schemes carry out a simple risk assessment before a good neighbour task is carried out. This assessment should be logged by the Link Scheme.

Personal Care

Under no circumstances should a volunteer be involved in the personal care of a client at any time. This type of support is beyond the remit of a Link Scheme and the training of the volunteers, and poses too great a risk to the clients, volunteers and Link Scheme itself.

A Hints and Tips Guide for home visits and outdoor work is included in the Annex.

F4: Guidance for Supporting Clients with Complex Needs

Wiltshire Link Schemes are increasingly being asked to support clients with complex physical and behavioural issues. These guidelines are intended to inform the Management Committee and be the foundation of local procedures on how best to support and protect these clients, as well as volunteers and the Link Scheme itself.

Manual Handling

- Volunteers Drivers are generally not trained in manual handling techniques. Community First advise that only clients who are able to move themselves into and out of a Volunteer Driver's vehicle should be supported via the Link Scheme transport service.
- Transport can be offered to wheelchair users provided that they are able to get themselves into and out of the vehicle without volunteer support. It is essential that a suitable Volunteer Driver (and vehicle) undertakes the journey as they will usually be required to physically handle the wheelchair on behalf of the client.
- While a 'helping arm' may be offered on occasion, general manual handling of clients, for example, into and out of chairs in the home, is not advised.

Common sense should be used when supporting people who are frail. The important issue is to ensure the safety of both the client and the volunteer.

- Many Link Schemes find it difficult to turn away clients with severe mobility issues, but volunteers are the most valuable asset that a Link Scheme has and if they are hurt as a result of undertaking work, other adults who need more care and support, may have to go without help.

Mental Health Issues

- Where support is of a non-transport nature, for example shopping or befriending, it is recommended that Link Schemes have policies in place to support volunteers to undertake such work. These might include (but are not limited to):
 - Safeguarding/Protection of adults who need more care and support policy and DBS checks(L),
 - Lone Working policy, and
 - Cash Handling policy.
- Community First can provide sample policies.

Dementia

- Support can be offered to clients with varying degrees of dementia. The level of support should be decided on a case by case basis dependent on the client's needs.
- Independent escorts can remove barriers that might prevent clients with dementia from accessing the service. For example, a client who is known to have advancing dementia may need an independent escort to accompany them on a journey to take responsibility for the client's behaviour and allow the Volunteer Driver to drive safely. It is recommended that the Link Scheme arrange the transport directly with the client where possible to ensure that they are able to fully understand a client's needs.
- Link Schemes need to recognise that the needs of a client with dementia will change over time and they need to have robust policies in place which allow them to respond should those needs affect the safety of the client or volunteers.
- It is acceptable for Link Schemes to refuse support if they are unable to provide the Link Service in a way which is safe for the volunteer and the client.

You may find the below web links useful

www.youtube.com/watch?v=WQ9uSR22qkI

<https://www.alzheimerswiltshire.org.uk/wiltshires-dementia-aware-project>

<https://www.ageuk.org.uk/search/?q=dementia>

Behavioural Concerns

- The Link Scheme service is open to the most vulnerable within our communities and all clients should be treated equitably and with respect. There may be occasions where a client exhibits behaviour that puts both the client and volunteer at risk. On-going support for clients exhibiting this behaviour should be decided on a case by case basis dependent on the client's needs.
- Clients exhibiting inappropriate or unsafe behaviour should be given the opportunity to address and adjust the behaviour in question before the Link service is withdrawn. However in cases where the Management Committee deems the behaviour to pose too great a risk to the volunteer or the client then the service may be withdrawn immediately.
- Independent escorts can be a way to remove barriers that might prevent clients with behavioural issues from accessing the service. For example, a client who has previously used Link services and has exhibited behaviour that has placed both the client and driver at risk should have an independent escort to accompany them on the journey to take responsibility for the clients' behaviour and allow the Link Volunteer to drive safely. It should be the responsibility of the client/service provider requesting the transport to provide the independent escort, not the Link Scheme.
- It is recommended that the Link Scheme arranges the transport directly with clients where possible (rather than through a third party) to ensure they are able to fully understand a client's needs. If booking the journey through a service provider such as a healthcare professional, ask if the client needs any additional support and ask them to provide an escort where appropriate.
- Link Schemes strive to help as many people as possible, but it is important to recognise that Link Schemes are not able to meet the needs of everybody and a Link Scheme might not always be the most appropriate service to help. It is acceptable for Link Schemes to refuse support if they are unable to provide the Link service in a way which is safe for the volunteer and client.

F5: Guidance for Health Related Journeys

The most frequent requests made to Link Schemes are for transport assistance to medical appointments. There are alternatives for some patients, although arrangements are different across the county.

While these journeys are priorities both for individuals and Link Schemes, consideration should be given to the following.

- Has the client requested transport via the Non-Emergency Patient Transport Service (the old ambulance car service)?
- Is it possible that there are non-driving volunteers who would be willing to accompany a client on the bus?
- Link Schemes are receiving more requests to undertake journeys to hospitals some distance away. These requests should be carefully considered both in terms of time and financial resources. Non-Emergency Patient Transport eligibility is the same for these journeys as for others.
- Patients who have had a general anaesthetic should not be transported by a volunteer unless they have an independent escort. This is also advisable for patients who have had conscious or twilight sedation.
- Clients with oxygen cylinders may be transported if the volunteer and Coordinator agrees. Precautions should be taken; ideally the oxygen cylinder should be secured in the boot of the car (but not left there for long periods), however where it is needed for use during the journey this may not be possible. In order to prevent the cylinder from becoming a missile it is essential that it is secured within the vehicle. A no smoking policy should be strictly enforced and a warning sign indicating that the vehicle is carrying oxygen should be displayed in the window. In addition it is sensible to keep a window open for ventilation so that oxygen does not accumulate in the car and avoid using a fuel station while the oxygen is in use. It may also be advisable to inform the vehicle insurance company.
- Patients undergoing chemotherapy or radiotherapy may be entitled to transport through the Non-Emergency Patient Transport Service. If frequent journeys are required sharing the load with the Non-Emergency Patient Transport Service is an option.
- Clients receiving certain types of benefits may be refunded under the Healthcare Travel Cost Scheme. Details of this scheme can be provided by Reception at each hospital.
- Relatives and friends visiting patients can be asked to travel with someone attending an appointment.
- Link Schemes are not an emergency service and should not respond to requests from surgeries or community hospitals to take people in for x-rays or other assessments at short notice.

F6: Guidance for Handling Serious Illness or Accident During Tasks

1. The volunteer should immediately contact 999 for further assistance, i.e. police, ambulance, etc. Then once the emergency services are in attendance the volunteer should contact the Coordinator. If unavailable, the Chairperson and if unavailable, another member of the Management Committee.
2. The Coordinator should inform firstly the Chairperson and if unavailable, another member of the Management Committee to attend the incident and provide support for the volunteer.
3. If the health of the client has been affected by the incident, the Coordinator, Chairperson or Management Committee member should inform any close family member of the client, or any person responsible for the client.
4. Following the incident the Chairperson, Volunteer Recruitment and Support Officer should provide on-going support for the volunteer, if necessary.
5. Contact to be maintained with relatives of the client, if applicable.
6. After the event the procedure should be reviewed and if necessary, revised.
7. It is important for the Link Scheme to have contact details for a client’s family or other responsible person, in case of emergency.

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Volunteer Activity and Guidance

Other Information Guides:

1. **Guide A:** Link Schemes and Community First
2. **Guide B:** Setting up a Link Scheme
3. **Guide C:** Link Management Committee and Trusteeship
4. **Guide D:** Link Coordinators
5. **Guide E:** Volunteer Recruitment and Support
6. **Guide F:** Volunteer Activity and Guidance
7. **Guide G:** Funding and Grants
8. **Guide H:** Gift Aid
9. **Guide I:** Risk Management and GDPR
10. **Guide J:** Operational Policies
11. **Guide K:** AGMs and Other Meetings

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The above guides are available to view and download on our website along with an Annex including guidelines, templates and other resources:

www.communityfirst.org.uk/transport/link/link-scheme-gpg

