



NHS Education for Scotland

Volunteer Handbook

A guide to volunteering at NES

3rd Edition



February 2020

Foreword

Thank you for your interest in volunteering with NHS Education for Scotland.

As a Special Health Board supporting NHSScotland, we greatly value the contributions made by volunteers to our work. Our experience of volunteer involvement has been positive; providing us with valuable views on the patient experience of health services and making us more accountable to service users in Scotland. Volunteers also play a useful role in balancing professional views in our numerous educational projects. While NES has welcomed help from volunteers, we hope that volunteers have also benefited from their involvement in our work by developing their knowledge and experience. Our overall approach to involving volunteers in NES's work was recognised by the achievement of the UK Investors in Volunteers award in the summer of 2013.

Building from our past experience we are planning to increase the number of volunteers in our work and to broaden the range of activities in which they are involved. Just as importantly, we are also committed to improving our volunteering practice to make sure that your experience of working with us is enjoyable and useful and that you are able to contribute effectively.

This Volunteer Handbook will provide you with information to help you perform your volunteering role effectively and get the most from your work with NES. Although you are not expected to read the Handbook from cover to cover, we hope you will keep it in a safe place for future use.

Good luck with your volunteering. I hope your role with us will be interesting and rewarding.

Stewart Irvine
Chief Executive
NHS Education for Scotland

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1. Hello!

The Volunteer Handbook is a source of information for all volunteers contributing to NHS Education for Scotland's work. It provides details about all aspects of volunteering, from initial induction and training, ongoing support and your own responsibilities. The Handbook provides information about important practical issues such as claiming expenses, health and safety and what to do if you have a complaint about NES.

The Handbook is only one source of information and guidance about volunteering at NES. You should also receive specific information about your role, an initial corporate and/or project induction and ongoing guidance from our staff. While there is no need to read the Handbook from beginning to end, you should keep it for future reference.

Please let us know if there is anything missing from the Volunteer Handbook, or if it contains information that is incorrect or unclear. Your feedback and suggestions will be welcomed.

2. About NHS Education for Scotland

2.1 What we do

NHS Education for Scotland works in partnership with NHS Health Boards and other organisations to support the education and training of the full NHS workforce – more than 160,000 people! We are a Special Health Board supporting education and training for all staff groups ranging from receptionists and porters to nurses, pharmacists, dentists and doctors. Although our work often focuses on individual professional groups there is a growing emphasis on multi-disciplinary work in important areas such as management and leadership, healthcare associated infection (such as MRSA) and clinical skills.

We provide educational support in the following ways:

- commissioning education from universities, colleges and other providers;
- funding healthcare professionals in training (doctors, clinical psychologists, dentists and pharmacists),
- quality assuring education and training delivered by NHS Health Boards
- providing education and training (usually continuing professional development courses)
- providing educational resources such as an NHSScotland electronic learning platform (Turas Learn), networks of Practice Education Facilitators, and numerous training and guidance materials.

2.2 Our vision and values

Our vision is '*A skilled and sustainable workforce for a healthier Scotland*'. You can assist us in achieving this vision by helping health professionals understand the needs and preferences of service users.

Everything we do is based on six basic principles:

- Promoting equality and diversity, and tackling health inequalities
- Working in partnership with stakeholders and demonstrating leadership
- Enhancing digital access to learning, services and information
- Systematically planning our activities, measuring their impact and learning from insights
- Continuously improving quality, and leading and harnessing innovation
- Clear accountability for our decisions, rooted in effective governance

2.3 How we are organised

NES comprises three professional directorates together with four support directorates as follows:

- Dentistry (supporting the whole dental team including therapists, dental nurses, hygienists, dentists etc and other staff groups such as healthcare scientists, optometrists and audiologists)
- Nursing, Midwifery and Allied Health Professions (supporting education through commissioning new courses and providing educational resources including Practice Education Facilitator networks, professional development for Spiritual Care teams and Healthcare Chaplains and Psychology including funding clinical psychologists in training)
- Medicine (postgraduate medical education, funding clinical undergraduate placements, providing professional development, GP appraisal etc) including Pharmacy who provide pre-registration training and post-registration professional development for pharmacists and pharmacy support staff

Our support directorates include:

- Digital (including Communications, IT, Development and Knowledge Services teams who are delivering technology solutions for health and social care staff across Scotland).
- Finance (including payroll, procurement and accounts)
Planning and Corporate Resources
- Workforce

In addition to the profession directorates, we have a NES Digital Services team, which develops national digital systems for services and service-users.

NES is a national organisation based in five offices throughout Scotland. Our central offices are in Edinburgh and Glasgow, but we are also located in Dundee, Aberdeen and Inverness.

2.4 What can volunteering at NES do for you?

We hope that you will enjoy volunteering at NES, and we will do our best to ensure that your experience is personally rewarding. There are several ways in which you can benefit as follows:

- Learn new skills and knowledge: volunteering is an excellent way of finding out about different services and job roles. We will also give you training to help with your volunteering role.
- Broaden your experience: your involvement in our work will provide opportunities to take on new responsibilities and try out new skills. This experience can help you into education or employment and discover alternative careers. We will be happy to provide you with references and testimonials.
- Make a difference to health care services in Scotland.
- Use your volunteering to build your interest in health services.

Please tell us about your reasons for volunteering at an early stage of your involvement so that we can help you achieve your personal aims. Your initial discussion with NES staff members is a good time to do this. We also encourage you to provide feedback about your experience throughout your involvement with NES.

2.5 Volunteer contributions

Volunteers contribute to our work in a number of different ways – each of them very valuable. These opportunities are frequently, but not always, related to educational projects at different levels. The following examples illustrate ways in which volunteers help us with our work:

- Membership of project steering groups, programme boards and working groups to advise on service-user needs and preferences, and to bring particular expertise to projects
- Providing service-user or 'expert patient' views at training sessions
- Helping to assess the communication skills of healthcare professionals
- Helping NES to decide business priorities
- Taking part in focus groups/consultation exercises about training needs
- Conducting small scale projects
- Testing our digital products and services to check they are accessible for all potential users.

Experts by experience

Our Psychology team works with a group of psychology service users who support Clinical Psychology training in Scotland. These 'Experts by Experience' get involved in teaching and provide important advice on research and course content. Their expert knowledge is unique and highly valued.

The activities in which you will be involved as a volunteer with NES are based on your preferences as far as possible and matched to your experience and skills.

Volunteering for improvement

Occupational Therapist Juliet McBean volunteered for NES's 'Good Work- Good Health: Vocational Rehabilitation' project. The project, which involved providing resources for to the Highland Region Community of Practice on the Knowledge Network site, helped NHS staff learn more about Vocational Rehabilitation (VR). Juliet is very positive about her experience of volunteering with NES saying that the opportunity '... to uphold my professional registration as an OT and to keep up my interest in VR, ticked both boxes'.

3. Your Volunteer Role

3.1 What you should expect from NES

We aim to make your experience of working with NES as enjoyable and beneficial as possible. To this end we will give you the support you need to contribute to our work. As a minimum, you should expect the following:

- **To be treated with courtesy and respect at all times** – this includes making sure your needs and preferences are respected, and your views and contributions valued. Your personal circumstances will be considered when arranging meetings and other activities.
- The opportunity to participate in our work for a term of two-years.
- The opportunity to work as a team with other volunteers and local, regional and national NHS staff and others.
- The **right to feedback** on your contributions to NES' work.
- **A healthy and safe working environment** – all NES offices have been risk assessed and copies of these reports are available on request
- **A role description** setting out the purpose of the volunteer role, how volunteers will contribute to our work and the expected time and travel commitments.
- **A personal briefing** on the projects/programmes in which you will be involved and your role
- **Information** about NES and the work in which you will be involved
- Entitlement to attend **corporate induction** days
- **Training and development** needed for you to perform your volunteering role as agreed with project leaders
- Provision of **travel tickets, car hire and overnight accommodation** where needed for NES work
- Payment of reasonable **childcare and communication support costs** where this is needed to take part in our work

A service user voice in Dental education

It's sometimes hard to talk when you're at the Dentists! This is why NES was happy to recruit two volunteers as members of the Acute Dental Problems project steering group. They play a valuable role in expressing the patient's view and improving the patient experience.

- Prompt **reimbursement of travel and subsistence expenses** incurred during NES work
- **A named point of contact** to provide advice, guidance and support on all aspects of your role.
- **A reference** for use in future education and employment. This will provide information about your volunteering role, the knowledge and skills that you demonstrated, and the personal qualities that you brought to the role.

3.2 Your responsibilities

While we have a duty to ensure that your voluntary work with us is rewarding, you are responsible for your own contributions to NES work and personal conduct. Your responsibilities are set out in each volunteer role description. We will however expect volunteers to follow general standards of conduct during their involvement. In particular we expect that you will treat our staff, other volunteers and the staff of partner organisations with dignity and respect. This will include observing the NES Equality and Diversity Policy and taking part in equality and diversity training (where this is appropriate). You also have a duty to take part in other types of training provided by NES as agreed.

You may have access to personal and confidential information (including trainee data, application forms and business information) where this is required for your role. Such information must be held securely and not shared with others (including friends and family). Any personal or confidential data should be returned to NES or securely disposed of when it is no longer needed. You will be required to sign a confidentiality agreement (Annex C).

Where you are receiving benefits such as Jobseekers Allowance, you must tell Jobcentre Plus about your involvement in our work. This may have implications for your availability for interview or work in some circumstances. You should also declare any travel and subsistence payments made to you that may be taxable.

4. Volunteer Support

As explained in 3.1 above, you should expect to be well supported as a volunteer with NES. The following provides further information about the different types of support that we provide.

4.1 Briefing, induction and information

Volunteers expressing an interest in working with us should receive simple, accessible information about NES and the work for which we are looking for help. This

information will be provided through telephone conversations, meetings, printed/electronic information etc.

An initial discussion with the project leader will provide you with further information about your role and the work in which you will be involved. This meeting will also give you an opportunity to tell us your reasons for volunteering so that we can meet your expectations and requirements as far as possible. Please tell us about your specific needs relating to the times, locations and dates of meetings, training needs etc.

You have the right to attend NES corporate induction days, which are held several times each year. Please speak to your named contact person if you would like to attend corporate induction.

4.2 Training and development

All volunteers contributing to NES initiatives are entitled to relevant training and development in proportion to the duration and nature of their involvement. Training needs will be discussed and agreed with you prior to involvement in our work. This may cover areas such as meetings practice, using IT, communication skills, and equality & diversity. Training will be provided through our Training Team, by the host project team or by external training providers as appropriate. NES can also arrange access to various online learning resources on request.

Examples of the training currently available through the NES Training Team include 'Equality & Diversity Fundamentals', 'Writing to Achieve Results', Health and Safety and Confidentiality and Data Protection, and NHS Elite (online IT training).

4.3 Risk assessment/health & safety

NES provides a healthy and safe environment for all volunteers involved in our work. Our premises are considered low risk to personal health and safety and are subject to risk assessment and regular inspection. We will give you copies of individual risk assessments on request. Training on relevant aspects of health and safety will be available to you, depending on the duration and nature of your involvement with NES.

It is unlikely that your volunteering role will involve unsupervised close contact with patients and their families. Should this be necessary for your role, you may be subject to further checks to ensure you are suitable for this role (please see <https://www.mygov.scot/disclosure-types/>). These checks will provide a safeguard for you and NES before you undertake any volunteering activity.

4.4 Insurance

Volunteers involved in our work are fully insured against personal injury and loss or damage of personal possessions. Insurance cover applies to all attendances on NES

premises and at external venues on NES business. You are also covered by our public liability insurance.

4.5 Complaints and grievance policies

You have the right to complain if you feel you have been treated unfairly by anyone at NES. If the grievance is with a member of staff, your first point of contact should be the lead officer for the project or initiative in which you are involved. If you have a grievance against the lead officer your first point of contact will be the NES operational lead for volunteering (Rob Coward) 0131 656 3264/rob.coward@nes.scot.nhs.uk).

At the first stage the aim should be to resolve the issue through informal discussion. If this is not successful, please put your concerns in writing and send to the NES operational lead for volunteering. This will be acknowledged by NES within three working days and responded to within twenty working days. If you are not satisfied with the outcome, the third stage will be to appeal to our Executive Lead for Volunteering whose decision will be final.

4.6 Other applicable policies and support

In addition to the above support, you are covered by a range of NES Human Resources policies originally designed to ensure the fair treatment of our paid staff.

5. Feedback and evaluation

We aim to continuously improve the experience of volunteers involved in our projects and programmes. For this reason, we will periodically evaluate our approaches to volunteer involvement and ask for your views on how we are doing. Project Leads will request your feedback during and at the end of your involvement in our work. This will include informal discussions and an informal 'exit' interview at the end of your involvement with us.

6. Out of Pocket Expenses

6.1 General Principles

You are entitled to prompt reimbursement of agreed reasonable travel, subsistence, communications support and childcare expenses incurred during NES work. The general principles, in the payment of travel and other expenses for volunteers, are that:

- you should not be out of pocket as a result of your volunteering work; and
- reimbursement cannot be made unless actual expense is incurred in the course of your volunteering.

6.2 Travel Tickets, Bus, Taxi, Car Parking, Toll Charges Etc: Receipts

You are encouraged to use public transport where possible. We will give you tickets in advance of travel where possible but will reimburse you for the costs of travel tickets, car parking charges, toll charges, bus, underground, ferry or taxi fares (where prior approval for use of a taxi has been given) where necessary. Receipts, used tickets, or ticket stubs must be attached to expense claims.

6.3 Mileage allowances

The mileage allowances for travel by private car, motorcycle and bicycle are shown in Appendix A. There are two levels of car mileage allowances and you should be advised, as part of your initial briefing, which rate will apply in reimbursement of your travel costs.

Public Transport (or Commuting) Rate

The 'Public Transport Rate', which covers the cost of fuel, is paid where you use your private motor vehicle to commute between your home and your volunteering role.

Standard Mileage Allowance

The 'standard mileage allowance', which takes motoring costs such as insurance and road tax into account, is paid when you use your private motor vehicle for authorised NES business. The mileage rates, which follow the current guidelines from HM Revenue and Customs, shown in Appendix A will be paid to volunteers who:

- drive their own private motor vehicles (including motor cycles) in connection with their involvement; and
- meet the insurance requirements set out below.

6.4 Motor Vehicle Insurance

Volunteers using their private motor vehicle (or a vehicle owned by a spouse or partner) on NES business must meet certain insurance conditions to claim the motor mileage allowance. You must ensure that your vehicle insurance policy covers the risks set out below.

A standard letter for you to send to your insurance company is attached at Appendix C. Copies of this letter will be given to you on request.

Where you use a private motor vehicle or a vehicle owned by your spouse or partner on authorised NES business, you must have motor vehicle insurance without financial limits covering third party death, injury or damage.

6.5 Driving licences

It is strictly prohibited for you to drive any vehicle as part of their public involvement duties within the NHS unless you have a valid driving licence. NES must check that you have a valid driving license before you use a car on NES business.

6.6 Subsistence allowances

6.6.1 Entitlement to subsistence allowances

Subsistence allowances are designed to cover out of pocket expenses such as meals, telephone calls and accommodation. This will include reimbursement of your expenses when attending training events in connection with your volunteering.

Appendix A gives details of the current subsistence rates.

6.6.2 Day Subsistence Allowance

Day subsistence allowance, which will be paid without receipts, covers the minimum periods detailed below where the volunteer has to buy meals:

- a day subsistence allowance may be claimed for a period of more than 5 hours and up to 10 hours; or
- a higher day subsistence allowance may be claimed for a period of more than 10 hours.

The day subsistence rate will not be paid when meals are provided.

6.6.3 24-hour Subsistence Allowance

The 24-hour subsistence allowance covers a period of up to 24 hours and includes spending on overnight accommodation and breakfast, lunch and dinner and other personal expenses (e.g. personal telephone calls). Bed and breakfast costs must be supported by a receipt attached to the travel and subsistence claim.

6.6.4 Staying With Friends Allowance

If an overnight stay is necessary in the course of your volunteering and you stay overnight with friends or relatives, you can claim the Staying with Friends Allowance. This allowance is a 24-hour rate covering accommodation and all meals in the 24 hour period from the start of your journey. Receipts are not needed to support a claim for this allowance. You are allowed to claim other personal expenses when staying with friends.

6.7 Payment methods

6.7.1 Advance payments

NES will arrange advance payment of expenses to volunteers to cover travel and subsistence expenses where it is not possible to provide tickets or book rooms directly. These advances can, if requested, be paid by Electronic Transfer into your bank account. You should then complete and submit a travel claim form showing the actual expenses and the advance received as soon as possible following the travel.

6.7.2 Cash payments

NES may also wish to make provision for payment of expenses in cash where small amounts are involved.

6.7.3 Communication/consumable expenses

You should, where appropriate, be reimbursed the costs of ink cartridges, paper, labels, envelopes, telephone calls and stamps specifically incurred in the course of your volunteering work where you can provide receipts.

6.7.4 “Other” Expenses

You can claim the “other” expenses detailed in the table below.

Other Expenses	Eligibility
Reimbursement of childcare expenses (subject to ceiling equivalent to the current hourly childminding rate paid by the local authority) or other carer expenses	all volunteers who incur such expenses while undertaking their volunteering duties and can provide receipts.
Reimbursement of reasonable additional expenses of people with disabilities.	all volunteers who have a disability and incur such additional expenses while undertaking their volunteering duties.
Reimbursement of reasonable expenses to enable carers to participate in voluntary activities	all volunteers who are main carers and incur such expenses while undertaking their volunteering duties and can provide receipts.

6.7.5 Expenses claim forms

Volunteers seeking reimbursement should complete the expenses claim form for external staff and submit this to the project lead/administrator together with supporting receipts. NES staff will help you complete and submit your claim forms. The claim form should be offered to you at meetings and will also be available on request from your named contact person within the relevant NES directorate.

6.8 Tax and benefit implications

Reimbursement of expenses may have implications for volunteers who receive benefits, including Jobseekers Allowance. Where appropriate, you are responsible for contacting Jobcentre Plus before your participation in any NES activities. You must also inform Jobcentre Plus about any travel and subsistence payments made and keep copies of the receipts. In some cases, subsistence payments can affect the level of benefit received.

You should also be aware that any subsistence payments made by NES may be classified as taxable income. It is your responsibility to declare additional income for tax or benefits purposes.

7. Health and Safety

We hope that you will be working in healthy and safe environments at all times and have put in place a number of arrangements to protect and promote good health. This is reflected by the award of the Scotland's Health At Work Gold Award to NES in 2009 (renewed in 2012). You should receive health and safety information as part of your initial induction to NES.

What happens if something goes wrong?

Unfortunately, accidents do happen, and we need to make sure that they do not happen again. You need to make sure that any incidents are reported. Please make sure that your volunteer contact makes an incident report and let the volunteering team know that something has happened.

8. Confidentiality and Data Protection

We have a duty of care to protect the confidentiality of your personal information at all times. To this end we will only collect and retain information needed for effective communication and to provide support. Your personal information will be held securely on a database held by the NES Volunteering Lead and shared with other individuals or used for other purposes only with your consent.

During the course of your involvement with NES you may have access to personal and confidential information (including trainee data, application forms and sensitive business information) where this is required for your role. You are requested to hold this information securely and not disclose it. Any personal or confidential data should be returned to NES or securely disposed of when it is no longer needed. Guidance on confidentiality and data protection will be provided.

All volunteers will be required to sign a confidentiality agreement (Appendix B).

9. Equality and Diversity

We are committed to eliminating discrimination and harassment and improving equality of opportunity for all. We also recognise and value diversity in employment, volunteering and in the delivery of our services.

To meet our commitment to eliminating discrimination and harassment and improving equality and diversity, we will try to ensure that:

- All potential and current staff, volunteers, NHS Scotland staff and service users are treated fairly and are not discriminated against or harassed;
- Equality and diversity is considered in the planning and delivery of policies, programmes and functions; and
- We provide a welcoming culture and environment which recognises and values all, challenges inequality, considers individual needs and circumstances and promotes good relations between groups.

You have the right to expect fairness and respect throughout your involvement with NES. This means that we actively encourage diversity among our volunteers and will respect and support diverse needs and preferences relating to aspects of life such as:

- religious practice;
- caring responsibilities,
- taking measures to ensure that NES activities are accessible,
- dietary needs.

10. Length of involvement

Individuals working with NES as volunteers have the opportunity to take part in our work for a term of two years. After two years, volunteers may request to extend their period of involvement. Such requests will be considered according to the following factors:

- your participation in an ongoing project;
- the demand for volunteering opportunities at NES;
- the need for specialised skills and knowledge.

11. Contacts

The following individuals are available to provide advice and guidance on any aspect of volunteering at NES.

Executive Director for volunteering:

Karen Wilson, Director of Nursing, Midwifery and Allied Health Professions

karen.wilson@nes.scot.nhs.uk

Operational Lead for Volunteering:

Rob Coward, Principal Educator 0131 656 3264

rob.coward@nes.scot.nhs.uk

APPENDIX A

Current rates for re-imbusement of out of pocket expenses

Subsistence Rates

1. Day Subsistence Allowance	
Volunteering of more than 5 hours but not more than 10 hours where meals are purchased (not payable if meals provided)	£4.90
Volunteering of more than 10 hours where meals are purchased (not payable where meals are provided)	£10.70
2. 24 hour Subsistence ¹	
Receipted cost of bed and breakfast up to a limit of (Boards may need to apply discretion and reimburse actual cost – this will depend on costs of B&B available)	£55.00
Meals allowance	£20
Personal incidental expenses allowance (e.g. telephone calls etc)	£5.00
3. Staying With Friends Allowance per night¹	£25.00
4. Personal Incidental Expenses Allowance¹	£5.00
5. Overnight by Train or Boat (per night)	£24.10

Motor Mileage Rates

Public Transport rate (or commuting rate)	24 pence per mile
Standard Motor Vehicle Mileage	45p per mile for the first 10,000 miles and 25p thereafter ²
Passenger Allowance	24 pence per mile
Bicycle	10 pence per mile
Motor Cycle	24 pence per mile
Public Transport costs	Actual cost

Other expenses

1. Reimbursement of reasonable receipted childcare or other carer expenses
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Eligibility: all volunteers who incur such expenses in the course of their volunteering work
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2. Reimbursement of reasonable receipted additional expenses of people with disabilities.

Eligibility: all volunteers with a disability who incur such additional expenses in the course of their volunteering.

¹ Only payable when overnight stay required.

² Based on HM Revenue and Customs guidelines for rate which is not taxable. Amounts in excess of those listed are taxable and subject to Class 1 NIC.

APPENDIX B

Confidentiality Agreement

During the course of your volunteering activity, you may have access to, see or hear information of a confidential nature. You are expected to use your discretion and maintain confidentiality about information relating to all aspects of your volunteering activity.

Disclosures of information relating to members of staff, other volunteers or that which you acquire during the course of your volunteering activity may only be disclosed with the agreement of the Project Lead/Co-ordinator. Personal and confidential data should be stored securely at all times and must be returned to NES or disposed of securely when it is no longer required.

You are reminded that a breach of confidentiality is liable to result in your volunteering role being terminated. Moreover, the Data Protection Act 1998 also renders an individual liable for prosecution in the event of unauthorised disclosure of information, or action for civil damages under the same Act.

I have received, read and understood NHS Education for Scotland's Confidentiality Agreement

Name

(Please print)

Signature

Date

Please return to:

Angela Bennett
Educational Development Directorate
NHS Education for Scotland
3rd Floor, Westport 102
West Port
Edinburgh EH3 9DN

APPENDIX C

Letter for motor insurance

Name

Address

Date

To (Insurance Company)

Re (Policy Number)

Dear Sir/Madam

I intend to undertake voluntary work for NHS Education for Scotland and I will use my vehicle to carry out voluntary duties and may carry passengers as requested. I will receive a mileage allowance for these journeys to contribute to fuel and the running costs of my vehicle. Such expenses will be in accordance with the HM Revenue & Customs tax free rate per mile. I estimate the number of miles driven under this voluntary basis will be _____ per year.

I should be grateful if you would confirm that my existing policy covers me for such volunteer driving. Please complete the reverse side of this letter and return to me. Please also confirm that my insurance policy contains a clause indemnifying NHS Education for Scotland with which I am a volunteer against third party claims arising out of the use of my vehicle for such voluntary work.

Yours faithfully

(Policy Holder)

_____ From
(Insurance Company)-----

Re (Policy Number)-----

Policy Holder/ Driver-----

This is to confirm that your policy covers voluntary driving (for which a mileage allowance may be received). This also confirms that the above policy contains a clause indemnifying NHS Education for Scotland with which you are a volunteer against third party claims arising from the use of the vehicle on such voluntary work.

Official Stamp

ISSUED BY _____ DATE _____