



South West Heritage Trust

Volunteer Policy

June 2022

Contents

1. The Vision and Mission of the South West Heritage Trust	3
Our Vision	3
Our Mission	3
2. Introduction	3
Definition of Volunteering	4
Aims and Advantages of the Volunteer Policy	4
3. Background to the Organisation	4
The Trust and this Policy	5
4. Recruitment	5
Expression of Interest	5
Interview	6
Disclosure and Barring Checks	6
Short-term Volunteers	6
5. Induction and Training	6
Induction	6
Information and Training	7
Type of Work	7
6. Support	7
Support and Supervision	7
Review Procedure	8
Expenses and Insurance	8
Commitments	8
Suggestions	8
Complaints Procedure	8
Leaving	9
7. Responsibilities	9
Confidentiality	9
Responsibilities of the Volunteer	9
Responsibilities of the South West Heritage Trust	10

Volunteer forms and information

- Appendix 1: Volunteer Application Form
- Appendix 2: Volunteer Agreement
- Appendix 3: Induction and Training Record
- Appendix 4: Volunteer Co-ordination Diagram

Policies

- Appendix 5: Safeguarding Policy
- Appendix 6: Equality, Diversity and Inclusion Policy
- Appendix 7: Health and Safety Policy
- Appendix 8: Data Protection Policy

1. The Vision and Mission of the South West Heritage Trust

Our Vision

We will celebrate and protect our rich heritage, helping everyone to enjoy it now and in the future.

Our Mission

Access, Learning and Enjoyment

- We will help people from all backgrounds to learn from our heritage and be inspired by it.
- We will encourage individuals and communities to get involved in our heritage.
- We will make our heritage as accessible as we can and will promote research and understanding.
- We will provide rich heritage experiences for everyone.

Care, Conservation and Protection

- We will make sure our heritage is excellently cared for.

Resilience

- We will build partnerships with funders and stakeholders to increase sustainability.
- We will strive for excellent, ambitious and entrepreneurial services.
- We will foster links between heritage, the arts, tourism and economic prosperity for the benefit of all.

Staff and Volunteers

- We will ensure that our workforce is skilled, motivated and diverse.

Our Values

The South West Heritage Trust values:

- Heritage in all its forms
- Opportunities for discovery and lifelong learning
- People as the heart of heritage
- The spirit of enterprise and development
- Creativity and innovation

Equality and Diversity

The South West Heritage Trust is committed to providing a working environment where all staff and volunteers are treated, and treat others, with dignity, fairness and respect and which is free from harassment and bullying.

All those who work for or volunteer with the Trust are of equal importance and should be respected and valued for their contribution and commitment and for the role they fulfil.

Volunteering empowers people to enjoy, learn about, understand and gain access to their rich heritage. Through this policy we hope to encourage greater ownership of, participation in and appreciation of the unique heritage of Somerset and Devon.

2. Introduction

The South West Heritage Trust ('the Trust') recognises that volunteers are invaluable members of the organisation and that they make a significant contribution to the work and objectives of the Trust. This document defines what is meant by volunteering and sets out the principles, practices and procedures that the Trust will follow in the appointment and management of volunteers.

Definition of Volunteering

Volunteers are individuals who put their experience, knowledge and skills at the disposal of an organisation, free of charge, with the primary aims of helping the organisation to achieve its service objectives and bringing some benefit to the local community. Volunteering is an important expression of citizenship and is vital for the continuation of the community's access to its history. It also enables the individual to enjoy participation in a social environment that is of interest to them.

Aims and Advantages of the Volunteer Policy

The aims of the Trust in adopting this policy are to:

- Encourage and enable the involvement of volunteers
- Highlight and acknowledge the value of the contribution made by volunteers
- Set out the principles governing involvement of volunteers and provide a set of procedures to ensure good working practices
- Recognise the respective roles, rights and responsibilities of volunteers and of the Trust

The advantages of this policy are:

- It gives a framework for recruiting and supporting volunteers
- It confirms the commitment of the Trust to volunteers
- It defines the responsibilities of both the Trust and the volunteers when entering into a volunteer agreement
- It sees volunteering opportunities complementing rather than replacing the work of paid staff
- Volunteering opportunities are promoted as a valuable and rewarding experience for both parties

3. Background to the Organisation

The South West Heritage Trust is an independent charity, which works across Somerset and Devon, providing a broad range of heritage services and experiences. Established in November 2014, we inherited heritage services and projects from Somerset and Devon County Councils. Our annual turnover exceeds £3.5 million and we employ 100 people, working across six sites. We have a leadership role in Somerset and Devon as a strategic cultural organisation and work with a broad range of partners across a diverse range of disciplines.

Through our **Museums Service**, we run the iconic Museum of Somerset in Taunton, the Somerset Rural Life Museum in Glastonbury and the Brick and Tile Museum in Bridgwater to tell the story of the South West. We care for 3 million museum objects, including a significant fine art collection, an extensive array of costumes and textiles, a nationally notable prehistoric bone and fossil collection, a large number of coin hoards, and a growing photographic record spanning the last 100 years. The Portable Antiquities Scheme is managed by the Trust in Somerset, Devon and Dorset.

We care for the written evidence of Somerset and Devon history, operating the **Archives and Local Studies Services** for each county. At our Heritage Centres in Taunton and Exeter, we accommodate over 7 million prime documents, dating from the 8th century to the present day. The Archive collection is rapidly growing with many records searchable using our new online catalogues. More than 350,000 local reference volumes about Somerset or Devon are held in the Local Studies Library. For those researching the history of families, towns, villages or events in Somerset or Devon, there is no better place to start.

Our **Historic Environment and Estates Service** supports local authorities, partners and the public by offering planning-related advice on Somerset's archaeology and built heritage. We provide the on-line Historic Environment Record where it is possible to find information about thousands of historic sites in Somerset. The service is also responsible for over 400 acres of historic landscape sites including Cothelstone Hill in the Quantock Hills and Deer Leap and Blackmoor reserves in the Mendip Hills.

Our **Learning Team** works across all services, providing a broad range of informal learning opportunities for children and families and formal lessons for schools for Key Stages 1 and 2. A Loans for Learning scheme makes authentic heritage objects available to schools to use in lessons.

In addition to the above, the Trust is supported by and works in partnership with important community groups and societies. These include:

- Friends of the Museum of Somerset
- Friends of Somerset Rural Life Museum
- Friends of Somerset Archives
- Friends of Devon Archives
- SANHS – Somerset Archaeological and Natural History Society

The Trust and this Policy

This policy and accompanying procedures are intended primarily for use by the Trust employees and volunteers. This policy indicates best practice to be adopted whenever possible but is not a legally binding document.

4. Recruitment

Expression of Interest

Initial contact can be made by:

- An individual
- Through an organisation such as the Friends groups or SANHS
- Through a volunteer bureau
- As directed through advertisements for a project
- Online

This contact can be initiated by:

- Completing an application form that can be found at Heritage sites, online at https://docs.wixstatic.com/ugd/f60e4e_640bb378f63144b4904c2b46620e28b2.doc?dn=SWHT%20Volunteer%20Application%20form%20MAR%202017.doc or at certain outreach event
- Direct contact in person, by telephone, or by email/letter. Following this form of contact an application form will be forwarded to the potential volunteer

Interview

Upon receiving the completed application form from a potential volunteer, an informal interview will be arranged to discuss the type of work the volunteer would like to undertake and any factors that should be taken in consideration. CVs and formal qualifications are not required. Successful applicants will need to provide two referees who will be contacted for a reference prior to any placement starting.

Disclosure and Barring Checks

The Trust recognises that it has a duty of care and protection towards both volunteers and service users. Therefore, we will make sure that where unsupervised access to children and vulnerable adults is involved, the Trust will undertake a risk assessment. If volunteer work on specific projects involves 'Regulated Activity', an appropriate level of DBS check will be undertaken.

5. Induction and Training

Induction

Every volunteer will be provided with an induction regarding their role, the site and the organisation. This will include a guided tour, with specific reference to first aid facilities, security precautions, fire exits, evacuation points and emergency plans. Volunteers will also be given Safeguarding briefing and time to read and understand the Trust Safeguarding Policy.

A checklist for the volunteer will be provided to monitor this process as well as initial work, training and support in the new role. In some cases work shadowing of another volunteer or paid member of staff will be made available.

All volunteers will be appointed a mentor, who will act as a point of contact if the volunteer has any questions or problems. During induction the mentor will discuss with the volunteer the length of the initial placement period. The placement will be reviewed at the end of this initial period to allow issues to be discussed and appropriate action taken should either party feel the placement is not working successfully.

The volunteer should be prepared to sign the Volunteer Agreement at their induction. This lays out the responsibilities of the organisation to the volunteer, and vice versa. It is not a contract of employment but an agreement regarding the standards of work and conduct. Ongoing volunteers will sign the Safeguarding Policy in the first month of their placement.

Information and Training

The Trust will:

- Ensure that volunteers receive information about their area of work and their responsibilities to each individual service section
- Make the volunteer aware of the location and use of the Volunteer Handbook, which contains the information on their role, the organisation and its policies and guidelines
- Provide volunteers with suitable and relevant training as well as ongoing opportunities for learning and skills development.

Type of Work

The Trust offers many different areas of work, and therefore has a range of roles on offer. The application form includes a section on areas of work. If the volunteer is unsure about which area they would like to work in, then this can be discussed during the interview. In certain circumstances volunteers' may be required to complete further forms relevant to the work they are undertaking, e.g. archaeological excavations.

A description of current roles or projects available to volunteers will be discussed during the interview. Following the interview, a suitable volunteer role will be allocated, dependent on availability. The Trust understands that not all volunteering activities prove successful and will work with the volunteer to ensure they are allocated to the most appropriate project and task.

6. Support

Support and Supervision

The Trust and associated organisations have a duty of care and support to all their volunteers and staff. Upon recruitment, every volunteer will be given a mentor or point of contact, who will act as supervisor and give induction training where relevant. Mentors must also offer support by providing necessary facilities and materials for volunteers to carry out appointed tasks. Networks of support exist in the Trust to help every volunteer through their initial placement period.

Review Procedure

The organisation and the volunteer will agree objectives for the volunteer during their placement. The volunteer will receive regular meetings and feedback sessions where their progress can be monitored and concerns raised. These sessions will also give the volunteer opportunity to request appropriate training to carry out their tasks, the provision of which is reliant on the organisation's capacity and budget.

Expenses and Insurance

The reimbursement of expenses is possible by the Trust, but is reliant upon the budget of each individual service. The volunteer will be made fully aware of the current situation at induction and of any changes during each financial year. The Trust will also ensure that volunteers are adequately covered by insurance while they carry out their agreed duties on the organisation's premises, in Trust vehicles, and in the community. They will be treated in the same way as staff for liability purposes.

Commitments

Volunteers are expected to adhere to the guidelines and policies adopted by the Trust, the most relevant of which can be found in this Volunteer Handbook. All volunteers should be made aware of these policies and should refer to the Volunteer Handbook or an appropriate member of staff regularly for guidance. These include:

- Safeguarding Policy
- Equality, Diversity and Inclusion Policy
- Health and Safety Policy
- Data Protection Policy

Suggestions

Volunteers should feel able to make suggestions regarding their role and any aspect of their time spent volunteering within the Trust. Volunteers should approach their mentor with any suggestions in the first instance.

Complaints Procedure

Should any volunteer have a complaint regarding any aspect of their time within the Trust, they should be able to raise their concerns without judgement. The first step is to discuss the issue with the nominated mentor. Every effort will be made to deal with the complaint fairly, regardless of its nature or any individuals or groups of individuals involved. If a satisfactory outcome is not achieved, a meeting can be arranged with an appropriate member of the organisation where the matter can be discussed further. In the event of the volunteer not being able to approach their mentor regarding a complaint it should be directed to the HR Officer by phone 07961674134 or email (ann.bradford@swheritage.org.uk).

The Trust recognises that volunteers have the same rights and responsibilities as paid members of staff. Therefore, if a volunteer behaves in a way that is inappropriate, or contrary to the policies adhered to by the Trust, the issue must be resolved by the manager

of the service area and the volunteer. If the appropriate member of staff feels the problem cannot be resolved, the Trust or organisation may have to write to the volunteer explaining that their services are no longer required.

Leaving

At the end of their placement or when the volunteer wishes to leave they will be offered an exit interview or questionnaire, as well as recognition from the organisation for the time and effort they have given. If a volunteer is unhappy in their role during their placement, they are encouraged to approach their mentor and discuss their concerns. The Trust will attempt to assist the volunteer to make their time volunteering successful, but recognise circumstances or needs may change. Where these cannot be met or addressed, the volunteer is free to either change their role if possible or leave the organisation.

7. Responsibilities

Confidentiality

The Trust recognises that volunteers may occasionally have access to information that is confidential, and expects the volunteers to respect this. The Trust also acknowledges that they will possess personal information and details about volunteers for their records, such as next of kin and emergency contact information. Personal information may be held in paper form and also electronically. This information will be kept confidential by the Trust, as per the regulations laid out by the Data Protection Act 1998 and the General Data Protection Regulations.

Responsibilities of the Volunteer

The volunteer is expected to:

- Accept the values and standards of the organisation and work in its best interests
- Represent the standards of the organisation in terms of reliability, courtesy and behaviour
- Participate in induction sessions and appropriate training dependent on the organisation's capacity
- Abide by the policies and procedures adhered to by the organisation as laid out in the volunteer handbook
- Accept that the organisation requires reliable volunteers that are able and willing to work at specified times
- Inform the relevant member of staff or contact person if they are unable to attend
- Give some notice if they are unable to continue volunteering
- Raise any issues or concerns relating to their work with their mentor
- Be able to meet the demands of the work without risk to their health

- Contribute to discussions relating to their role within the organisation and feel able to express comments or opinions regarding ways in which tasks might be best accomplished
- Keep their mentor informed of all work they carry out on behalf of the organisation
- Ensure confidentiality when dealing with confidential information relating to the organisation and individuals
- Understand that volunteers and staff are considered to be partners working alongside each other in implementing the mission and programmes of the organisation

Responsibilities of the South West Heritage Trust

The South West Heritage Trust is expected to:

- Respect the skills, dignity and individual needs of volunteers
- Provide adequate information, training and assistance for volunteers to be able to meet their responsibilities and tasks, as agreed in the role description
- Provide a volunteer handbook on site containing relevant policies and procedures
- Accept that volunteers may be unable to attend occasionally at their agreed time and be willing to be flexible when possible
- Inform volunteers if the organisation needs to change the time and date of their placement or if the placement is coming to an end
- Accept that the circumstances of volunteers may change and be willing to discuss changing availability or the termination of a volunteer agreement
- Provide a reference, subject to satisfactory completion of tasks and duties
- Ensure volunteers have satisfactory supervisory support and to provide volunteers with feedback on their performance
- Ensure the environment is a safe place to work, and that Health and Safety relevant to the area of work is covered in the Induction procedure
- Be receptive to any comments volunteers may make regarding ways in which tasks might be best accomplished
- Communicate regularly with volunteers through their mentor about the tasks they are undertaking on behalf of the organisation
- Ensure confidentiality regarding any personal information
- Treat volunteers as equal partners with the organisation's staff, jointly responsible for completion of the organisation's goals and the fulfilment of its purpose