



Volunteer and Trainee Policy

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1 Introduction

This policy reflects Perth and Kinross Heritage Trust's commitment to develop and deliver activities and projects that increase awareness, understanding and appreciation of the historic environment and that support the sectoral skills base through the delivery of traditional building and archaeological skills training. *This policy has been revised from the PKHT Best Practice Procedures and Policies (2011).*

2 Purpose of the Volunteer Policy

The Trust recognises that volunteers make a valuable contribution to our strategic aims and priorities. The Trust is committed to fair, clearly stated and supportive relationships between the organisation, its staff and supporters. We recognise the added value that volunteers bring to the organisation and to those who use our service. This volunteer policy aims to clarify the role of volunteering within PKHT, promote the development of volunteering within the Trust and ensure that a fair and consistent support framework is in place for our volunteers and trainees.

2.1 Aims of the Volunteer & Trainee Programme

- To increase awareness, understanding and appreciation of the historic environment through offering active engagement opportunities to members of the local and wider community;
- To offer fulfilling volunteering experiences that support the sectoral skills base and promote personal and skills development for participants;
- To utilise the skills, knowledge, expertise and enthusiasm of people living in the local community to enhance and support the delivery of projects;
- To provide staff with volunteer support that enables delivery of high quality visitor experiences and events;
- To increase organisational capacity and enable the Trust to meet its aims and objectives;
- To develop and foster the Trust's relevance and active involvement within the local communities across Perth and Kinross.

3 Definitions

Within PKHT a volunteer is understood to be a person who does voluntary work on the Trust's behalf. A trainee is understood to be a person who is participating in a formal learning placement where skills training is provided to them by a suitably qualified individual.

PKHT aims to involve as many people as possible in the process of investigating and conserving their cultural heritage and recognises, supports and values the role volunteering has in facilitating this. The Trust also acknowledges the need to give students practical experience in archaeological fieldwork and will seek to offer opportunities where possible. Volunteering and training will not, however, be undertaken at the expense of professional standards or risk to the heritage resource.

PKHT will not use volunteers or students in lieu of employed staff when funding is agreed for the latter. Volunteers are not asked to take on tasks formally undertaken by staff in times of industrial action.

4 Volunteer and Trainee Recruitment

We welcome volunteers from all walks of life, experience or skills who have an interest in our work. We will promote volunteer opportunities through a variety of means including direct mailing to registered supporters on the Trust database, the Trust website, social media, posters, local press, specialist publications, event brochures, and word of mouth among others.

Prior to participation, volunteers and trainees are required to complete a registration form where they will be asked to provide personal contact information relating to themselves and an emergency contact. They will also be asked to disclose more sensitive, special category data relating to their age and health conditions (mental or physical) that they feel may affect their ability to participate in project activities (e.g. manually exertive tasks such as archaeological excavation).

The registration form does not need to be completed again when registering for future activities if permission has been provided to retain this data on file. Forms will be made available electronically via email.

Some volunteer roles or activities may require an informal interview (e.g. where specific experience or skills are required). Occasionally references may also be requested either to confirm expertise or provide evidence of previous commitment.

Occasionally an applicant may not be considered suitable or fulfil necessary criteria to participate in which case the project volunteer/trainee coordinator will inform the individual with a full explanation for their decision. Where alternative options may exist, these will be discussed with the individual. Perth and Kinross Heritage Trust reserves the right to decline applications and prevent participation where applications do not fulfil recruitment criteria or the health and safety of the applicant, other participants or staff may be put at risk.

4.1 Induction and Protocols

All volunteers are required to attend any site orientation and health and safety briefings offered as part of the placement. Project managers and event organisers will be responsible for providing further orientation and training as necessary.

All volunteers will receive full training in and information about their area of work, their responsibilities to PKHT or the contractor delivering the placement activities.

Any volunteers requested to lone work will be encouraged to read and adhere to the Trust's Lone Working Policy. The Trust will endeavour to ensure, wherever possible that volunteers do not have to work alone.

Risk Assessments will be carried out on all activities and events to ensure the safety of staff, volunteers, trainees and members of any groups led and organised by the

Trust. All volunteers will have access to the risk assessments and encouraged to familiarise themselves with their content.

4.2 Expenses and Subsistence

Volunteers and trainees are expected to make their own travel and catering arrangements and cover any expenses associated with getting to and from the placement. Where project budgets allow, the Trust will endeavour to arrange transport to assist participants with their journey. Information will be circulated if this option is available. The Trust will only reimburse travel expenses if these have been discussed and agreed with the project manager or event organiser in advance. Any travel expenses will be reimbursed in line with the Trust's current mileage rates.

4.3 Supervision, Support and Review

Each project will have an agreed volunteer/trainee supervisor who will provide appropriate training, supervision and assistance where required. The extent of supervision and support will depend on the nature of the placement, the complexity of tasks being undertaken and the individual needs of the volunteer/trainee.

If a participant feels they are being treated unfairly or are receiving insufficient support to understand and/or undertake the tasks assigned to them, they should raise their concern with the project manager or event organiser in the first instance and the Trust Director if the issue is not resolved. If a participant is considered not to be performing adequately or safely, PKHT reserves the right to terminate the placement.

4.4 Resolving Problems

The relationship between PKHT and its volunteers/trainees is entirely voluntary and does not imply any contract of employment, nor should the guarantee of any employment be suggested through volunteering/undertaking training. PKHT endeavours to create enjoyable learning and volunteering experiences where, through regular contact with supervisors, volunteers and trainees feel supported and able to discuss any day to day queries or problems as they arise. Where this is not the case, PKHT will try to resolve any problems, grievances or difficulties fairly and efficiently.

4.5 Insurance

Whilst on a placement with the Trust, all volunteers are covered by PKHT's Employers Liability insurance. Volunteers using their own vehicles will need to check their insurance cover with their own providers. **The insurance does not include personal liability in respect of a criminal charge.**

5 Equal Opportunities

The Trust will not discriminate on the grounds of race or ethnic origin, social or economic class, gender, disability, religion/belief, sexual orientation or age, in line with our Equal Opportunities Policy.

All volunteers will receive equal treatment regardless of age, disability, gender reassignment, marital or civil partner status, pregnancy or maternity, race, colour, nationality, ethnic or national origin, religion or belief, sex or sexual orientation (known as Protected Characteristics).

6. Data Protection, Use and Retention Statement

In order to create and manage safe volunteer/trainee placements, PKHT does request the use and retention of some personal information from participants. This data is collected, strictly controlled, held securely and processed for the purpose of ensuring the health and safety of all placement participants and project staff. It will be used to provide additional information and offer support to the volunteer/trainee as well as for risk assessing and implementing appropriate health and safety measures.

Personal information will be collected by a digital registration form and will be held securely and only for as long as is strictly necessary for the Trust to fulfil core and project operational and administrative activities/ administration (e.g. project duration). Supporters will be contacted at the end of the project they have been involved in and offered the opportunity to have their data removed or to have it retained and be contacted about future Trust activities that may be of direct interest to them. Supporters will be contacted on a 3 yearly basis and invited to update their preferences; they are also free to have their personal data removed from record at any intermediate time.

Where a third party contractor is employed to deliver project activities, it may be necessary to share some special category data with the nominated volunteer supervisor, or in the case of an emergency, with the first aid or emergency services responder, to ensure safe operations.

PKHT fully complies with current data protection legislation with regards the collection, processing and retention of personal data. For further information on how information is used, securely maintained, and personal rights to access information held please see the Trust Data Protection Policy (www.pkht.org.uk/resources/policies).

7. Protecting Vulnerable Groups (PVG) and Disclosure

Volunteers and trainees will not be required or permitted to undertake regulated work with children (under 16s) or protected adults. 'Regulated work' is defined by the Disclosure Scotland and the Scottish Government as 'having unsupervised contact with children and/or protected adults.' Further information is available in the Trust's Protection of Vulnerable Groups Policy.

8 Health and Safety

PKHT has a duty by law to provide a safe working environment, to do all that is reasonably practical to prevent harm to staff, trustees, volunteers, trainees and visitors, and to prevent loss or damage to buildings and equipment. Volunteers are asked to co-operate in the implementation of the health and safety procedures and to familiarise themselves with the Trust's health and safety policy. All placement

participants have a responsibility to look after themselves and others. Any problem or potential problem should be raised with the nearest member of staff.

Volunteers and Trainees are asked to:

- Take reasonable care for their own safety and others who may be affected by what they do or do not do;
- Observe any warning notices and co-operate with PKHT and contractors on health and safety matters;
- Not interfere with, or misuse, anything that is provided for health, safety and welfare;
- Raise any potential health and safety issues identified with a supervisor.

Volunteers and Trainees should not attempt to carry out any task that may endanger themselves, the public or any member of staff. Some tasks considered routine may have health and safety implications when performed on a placement. For example, fixing a door handle, changing a light bulb, or giving first aid. Only trained members of staff should undertake potentially dangerous tasks.

We expect volunteers and trainees to take a responsible attitude to health and safety and only carry out tasks they feel fit and able to complete. If in doubt about fitness to carry out a task, a supervisor should be consulted before attempting the task.

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Latest revisions by: Gavin Lindsay, Research & Engagement Officer

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Signed by: Sue Hendry, Chairman (with agreement of the Board of Trustees)

Signature:

Date: