

# Fort Amherst Heritage Trust

Fort Amherst, Dock Road, Chatham, Kent. ME4 4UB

T: 01634 847747

E: [admin@fortamherst.com](mailto:admin@fortamherst.com)

W: [www.fortamherst.com](http://www.fortamherst.com)

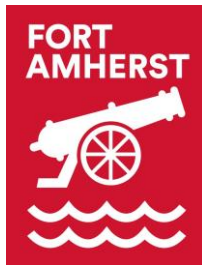
## MAIN HANDBOOK

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## INTRODUCTION AND WELCOME

The Board of Trustees and I would like to welcome you to volunteering at Fort Amherst Heritage Trust and wish you every success during your time with us. We hope that your experience of volunteering here will be positive and rewarding.

Fort Amherst is mainly staffed by volunteers who cover a range of roles, including (but not limited to) events, restoration and maintenance, tour guide, café assistant, archiving, general administration and ordnance.

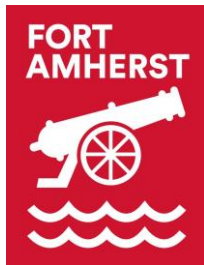
Volunteers play a central and vital role at Fort Amherst and we value your contribution immensely. By volunteering at the Fort you're joining an organisation that is passionate in its commitment to ensuring that we maintain our heritage and long-standing historical importance.

We know that starting your volunteer role can be a little daunting. This Volunteer Handbook is designed both to introduce you to our organisation and to be of continuing use during your time with us. It should help you orientate yourself as a new volunteer and understand how things work at Fort Amherst.

We ask that you study carefully the contents of this Volunteer handbook as, in addition to setting out our rules and regulations, it also contains information on the policies and procedures relating to your volunteering time with us. Your volunteering buddy or team leader will work with you to ensure you are fully briefed for your new role, but if you are unsure about anything – **just ask**.

Please note that we provide equal opportunities and are committed to the principle of equality. We expect your support in implementing these policies. We will not condone any unlawful discriminatory act or attitude in the course of your volunteering with the Fort, or in your dealings with our visitors, suppliers, paid staff members, trustees, or fellow volunteers. Acts of unlawful discrimination, harassment or victimisation will result in disciplinary action.

General amendments and updates to the Volunteer Handbook will be issued from time to time. You can check for updates which will be posted in the volunteer centre and volunteer database website by the General Manager.



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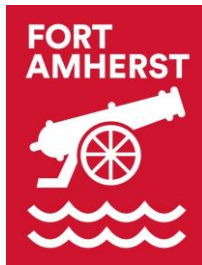
I look forward to supporting you in your volunteer role, and to working with you in the future. Together we can ensure that the Fort Amherst heritage continues for many more generations to come.

With best wishes,

Bill Fowler

Chairman

Fort Amherst Heritage Trust



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## JOINING FORT AMHERST HERITAGE TRUST

### ***THE FORT, PAST, PRESENT AND FUTURE.***

An overview of the history of the Fort can be found on our website – [www.fortamherst.com](http://www.fortamherst.com) under the “History” section. This is also included in your onboarding training.

Here you will find information about the Fort, listed in sections covering the Fort Amherst Heritage Trust, the mission, vision and aims of the Trust, the origins of Fort Amherst and its modern history, together with the latest volunteer charter and a section covering frequently asked questions.

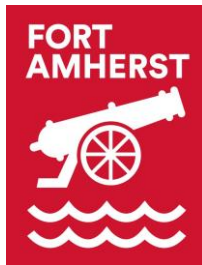
If you do not have access to the internet, or are unsure how to navigate around the website, please ask the General Manager for assistance.

### ***DIFFERENT CONTRIBUTIONS. EQUAL TREATMENT***

Volunteers make a unique and essential contribution to our work and many of our services would not be able to function without volunteer support. Our volunteers come from a diverse range of backgrounds and experiences and contribute in different ways to the work of Fort Amherst Heritage Trust. We aim to offer a variety of volunteer roles that reflect the needs of the organisation and provide opportunities for volunteers to use and develop a range of skills, knowledge and experience.

We treat volunteers with the same level of respect that we would a paid staff member, whilst recognising the need for clear distinctions between paid and voluntary roles. It is important that we make this distinction and we see volunteers as adding value to our services rather than substituting for paid staff roles. We look for the best in our volunteers and aim to work with people’s skills and build on their strengths.

It is the policy of Fort Amherst Heritage Trust to ensure that no volunteer receives less favourable treatment on the grounds of sex, race, marital status, disability, age, sexual orientation or religion. Or is disadvantaged by conditions or requirements that cannot be shown to be justifiable.



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## ***RIGHTS, ROLES AND RESPONSIBILITIES***

All volunteer roles have a clear role description outlining the key activities involved. It is important that all volunteers are familiar with the relevant role descriptions.

Volunteers sometimes have multiple roles within the organisation; they may also be customers, trustees, ex-staff members or seasonal staff. It is important to recognise that switching between different roles can be challenging for volunteers and that we aim to support volunteers in this by being clear about their role, tasks and our organisational expectations.

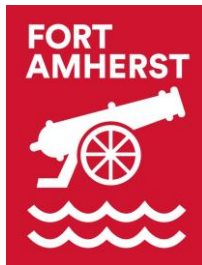
## ***PERSONAL GROWTH AND DEVELOPMENT***

We aim to provide high quality volunteering opportunities, learning and development activities and support to all volunteers within the organisation. We have a comprehensive induction programme and provide a calendar of learning and development activities.

We recognise that many people use volunteering as a way to grow, develop and change and it can act as a stepping stone to employment, education, training or other life developments. Some volunteers will stay with us for 10 years or more, others will move on after 6 months or a year. Whilst we have a strong track record of retaining volunteers, we also acknowledge that each volunteer will have individual motivations, hopes and aspirations and we try to work with them to ensure that, as far as possible, they have a rewarding experience at Fort Amherst.

## ***RECOGNITION***

We aim to recognise volunteer contributions in a range of ways from saying thank you on a day to day basis, to nominating volunteers for local and national awards. The volunteering staff team also co-ordinate regular social events and recognition events for volunteers. You can find further details by checking the website diary by speaking to the General Manager.



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## **VOLUNTEERING AND BENEFITS**

You are allowed to volunteer while claiming state benefits, including means-tested benefits such as jobseeker's allowance (JSA), incapacity benefit, income support, and employment and support allowance (ESA).

**You must tell your job coach or benefits adviser that you are volunteering.**

- You can volunteer as many hours as you like while you're getting benefits as long as you keep to the rules for getting them.
- You can still volunteer if you're on universal credit as long as you also undertake any activities, such as job searching, training or other requirements, identified by your Jobcentre Plus adviser.
- The Government has produced a volunteer placements, rights and expenses guide and you can find it here: [www.gov.uk/volunteering](http://www.gov.uk/volunteering).

## **CLAIMING EXPENSES**

You should not be "out of pocket", as a result of your volunteering at Fort Amherst Heritage Trust. As part of our commitment to supporting volunteers, we reimburse travel and any purchases made on behalf of the Fort. We encourage all volunteers to claim expenses; however, if you do not wish to receive expenses, you can donate them back to Fort Amherst Heritage Trust. Donations can be made by filling in a donation form.

Please read the separate volunteer expenses policy for more detail on what you can and cannot claim for, and the current claim rates.

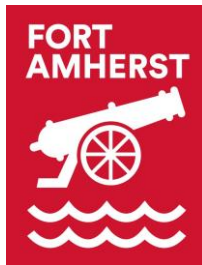
### ***HOW TO CLAIM EXPENSES***

All volunteer expenses should be submitted on a Volunteer Expenses Claim Form with details of the dates, distance and reasons for expense together with receipts for all expenditure where practicable.

The Expenses Claim Form should then be signed by the volunteer claiming the expenses and approved by the General Manager or Treasurer.

### ***PAYMENT OF EXPENSES***

Volunteers' expenses will be paid via the Fort's Treasurer/Accountant weekly. Payments will be made by BACS (direct bank transfer) as this is much quicker for you and cheaper for the Charity.



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## **SAFEGUARING STANDARDS AND HEALTH & SAFETY**

### ***ACCIDENT REPORTING***

If you have an accident or incur any kind of injury whilst volunteering, you **must** record it in the accident book. This should be done for even the most minor of accidents, even if there is no apparent injury and for near misses.

Once completed the accident book should be passed to the staff member who supervises you or to the General Manager.

### ***ALCOHOL AND DRUGS POLICY***

Fort Amherst has a duty of care to ensure as far as is reasonably practicable, the health and safety and welfare of all of our volunteers and employees. Similarly, you have a responsibility to yourself and those volunteers and employees on site.

The use of alcohol and drugs may impair the safe and efficient running of the Fort and/or the health and safety of those working or volunteering here.

If your performance or attendance at the Fort is affected as a result of alcohol or drugs, or we believe you have been involved in any alcohol or drug related action/offence, you may be subject to disciplinary action and this may lead to the termination of your volunteering with the Fort.

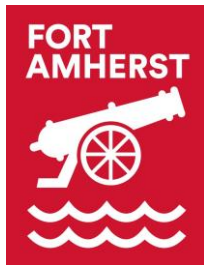
### ***CLOSED CIRCUIT TELEVISION***

Closed circuit television cameras are used on our premises in several locations for crime prevention and for your safety. We reserve the right to use any evidence gathered in this manner in any disciplinary issue.

### ***DRIVING ON SITE***

There is a **STRICT** 5mph speed limit on site, for all mechanically propelled vehicles. This is for the safety of our visitors, volunteers, staff and the wildlife that we share the site with.

- Driving of any of the Fort's vehicles will only be allowed by those volunteers in possession of a current and valid driving licence and only after the appropriate training on the safe use of operation the vehicle has been given and your right to drive has been "signed off" by the General Manager.
- No exceptions will be made to this requirement and any volunteer found in breach will be asked to leave the site immediately and will be subject to disciplinary action.



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- Those volunteers authorised to drive Fort vehicles will be required to show their driving licence to the General Manager on a regular basis to ensure it remains valid.
- Please note that smoking is not allowed whilst in any of the Fort's vehicles.

## ***CONFIDENTIALITY***

All information that is or has been acquired by you during, or in the course of, your volunteering time with the Fort, or has otherwise been acquired by you in confidence: relates particularly to our Company, or that of other persons or bodies with whom we have dealings of any sort; and has not been made public by, or with our authority; **shall be confidential**, and (save in the course of our business or as required by law) you shall not at any time, whether during your volunteering period, or after you have left, disclose such information to any person without our written consent.

You are to exercise reasonable care to keep safe all documentary or other material containing confidential information, and shall at time of leaving as a volunteer, or at any other time upon demand, return to us any such material in your possession.

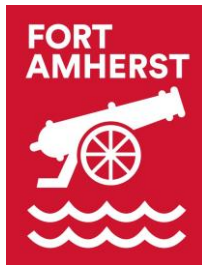
You will be required to sign the Fort Amherst Heritage Trust confidentiality form which is contained within the appendix to this handbook.

## ***COMPANY PROPERTY AND COPYRIGHT***

All written material, whether held on paper, electronically or magnetically which was made or acquired by you during your volunteering time with us, is our property and, where appropriate, our copyright. At the time, if ending your volunteering time with us, or at any other time on demand, you shall return to us any such material in your possession.

## ***COPYRIGHT***

If you are writing materials for Fort Amherst Heritage Trust, as part of your volunteering (e.g. leaflets, training materials etc) we will ask you to fill in a form to sign the copyright over to Fort Amherst Heritage Trust. This is because copyright law works differently for volunteers and paid employees. This form is contained within the appendix to this handbook.



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## **GDPR – THE GENERAL DATA PROTECTION REGULATION, 2018**

The GDPR (General Data Protection Regulation) is concerned with respecting the rights of individuals when processing their personal information.

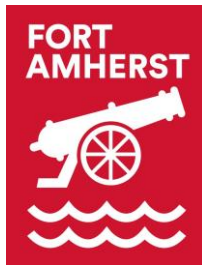
- Your personal data will be processed fairly, lawfully and in a transparent manner.
- The data will be obtained for specified and lawful purposes and not further processed in a manner that is incompatible with those purposes.
- The data will be adequate, relevant and not excessive.
- The data will be accurate and where necessary kept up to date.
- Data will not be kept for longer than necessary.
- Data will be kept secure.

All volunteers have a responsibility to ensure that their activities comply with the data protection principles. Volunteers should not disclose personal data outside the organisation's procedures, or use personal data held on others for their own purposes.

You have the right upon written request to access information that we may hold on you. This could include information regarding any grievances or disciplinary action, or information obtained through monitoring processes.

For further information, see our Privacy Statement:

<https://fortamherst.com/privacy-policy>



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## **EMAIL AND INTERNET POLICY**

- **Internet**

Where appropriate, authorised volunteers will be able to use the internet. However, attention must be paid to ensuring that any published information has relevance to normal professional activities before material is released in the Fort's name. Where personal views are expressed, a disclaimer stating that this is the case should be clearly added to all correspondence. The intellectual property right and copyright must not be compromised when publishing on the Internet. The availability and variety of information on the Internet has meant that it can be used to obtain material reasonably considered to be offensive. The use of the Fort's equipment to access and/or distribute offensive material of any kind may result in disciplinary action.

- **Email**

The Company will not tolerate the use of the email system for unofficial or inappropriate purposes, including personal use without prior authorisation. Unauthorised or inappropriate use of the Fort's email system may result in disciplinary action. The Fort's email system is for communication and matters directly concerned with the legitimate business of the Company.

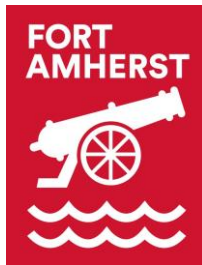
- **Monitoring**

We reserve the right to monitor all email / internet activity for the purposes of ensuring compliance with our policies and procedures and you hereby consent to such monitoring. Information acquired through monitoring may be used as evidence in disciplinary proceedings.

## **USE OF COMPUTER EQUIPMENT**

To control the use of the Fort's computer equipment and reduce the risk of virus or data contamination the following will apply:

- The introduction of new software must first be checked and agreed with the General Manager and the IT Support team
- Only authorised volunteers will have access to the Fort's computer equipment
- Only software that is used for business applications may be used
- Unauthorised access to the Fort's computers may result in disciplinary action



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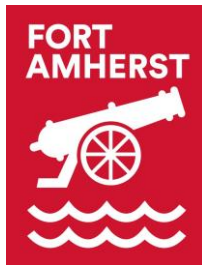
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## ***USE OF SOCIAL NETWORKING SITES AND SOCIAL MEDIA.***

Social media can be a very powerful tool which enhances the services we provide to our visitors. We use social media in many ways now to promote events and disseminate other useful information to the public.

- Any work-related issue or material that could identify an individual who is a client, visitor, volunteer, paid colleague or trustee, which could potentially adversely impact the reputation of the Fort must not be placed on any social networking or social media site.
- In effect, this means that volunteering related matters must not be placed on any site at any time either during or outside of volunteering hours at the Fort without the express permission of the General Manager.
- Volunteers must not offer any views on negative comments about Fort Amherst Heritage Trust made by members of the public or other volunteers. This includes the posting, liking, or linking to comments on social media sites including but not limited to Facebook, Twitter, Instagram, Snapchat etc.
- The Fort retains the right to check postings on social media sites, and where these have been posted by volunteers and are believed to reflect the Fort, its staff, trustees or volunteers in a negative light, the Fort retains the right to seek removal of such posts with immediate effect and this may result in disciplinary action being taken.



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## **EMERGENCY CONTACTS**

We ask all volunteers to provide us with details of a person that we can contact in the event of an emergency. You will also be asked to supply your own contact details including a mobile number, so that we may contact you if necessary. Please tell the General Manager immediately if any of your emergency contact details change.

This information is held securely and is only available to Fort Amherst Heritage Trust.

## **FIRST AID**

There are several designated first aiders on site. Please identify who they are and where they can be found on any given day by following the notices on the information boards or by checking with the Rangers / General Manager.

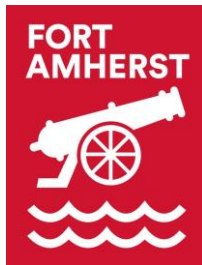
If you hold any relevant first aid qualifications, please make the General Manager aware so you can be added to the central register once you have settled in and are happy to offer your services.

## **FITNESS TO VOLUNTEER**

If you arrive to undertake your volunteer duties and judged not fit to carry these out, we reserve the right to exercise our duty of care if we believe you may not be able to undertake your duties in a safe manner, or may pose a safety risk to yourself or others, and we may send you away for the rest of the day. Dependant on the circumstances this may result in disciplinary action.

## **HYGIENE**

- Because of the nature of the site, any exposed cut or burn must be covered with a first aid dressing.
- If you are suffering from an infectious or contagious disease or illness you must not report for volunteering without clearance from your own doctor and with prior agreement from the General Manager.
- Contact with any person suffering from an infectious disease must be reported to the General Manager before reporting for duty.



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## GENERAL TERMS & PROCEDURES

### **KEYS**

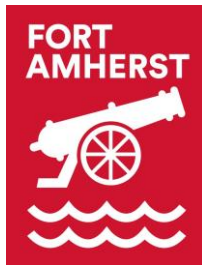
- You must ensure that all procedures and guidelines are followed when entering and leaving any buildings.
- Any keys must be signed in and out of the key safe and returned at the end of the day.
- You must not give any keys to a third party, nor must you make additional copies of any keys.
- Any loss or damage caused as a result of your failure to follow procedures or your negligence in ensuring the safekeeping of any keys, may result in disciplinary action. We reserve the right to seek reimbursement from you of the cost of any loss, repair or replacement in the case that the disciplinary case is upheld.
- Any loss or theft of keys must be reported immediately to the General Manager.

### **SMOKING POLICY - Must be observed at all times.**

- We ask that you do not smoke whilst in view of the public.
- If you are a smoker, you must smoke only in the designated smoking areas. If you are not aware of the locations of our designated smoking areas, please ask the Rangers/ General Manager.
- Please do not drop any cigarette litter on the ground. You must dispose of it carefully and responsibly.

### **PERSONAL PROTECTIVE EQUIPMENT (PPE)**

For a number of volunteer roles PPE is required to be worn. PPE may involve gloves, hard hats, work boots and high visibility jackets. Where you do not have your own PPE, the Fort will provide it. Not all roles require PPE to be worn, but where it is required the General Manager or team leader will advise you and will check to ensure that PPE guidance is being followed.



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## **PHOTOGRAPHY**

We may take photos of you whilst you are volunteering at Fort Amherst Heritage Trust, for use in publicity materials or on our website. Photographs are a great way of promoting the tasks that our volunteers are carrying out.

- You will be asked to complete a consent form, giving permission for us to use your image. You can of course choose not to allow us to use photographs of you.
- If you have any questions about how we use photographs of volunteers, please speak to the General Manager in the first instance.
- The consent form is contained within the appendix to this handbook.

## **RIGHTS OF SEARCH**

Although we do not have the contractual right to carry out searches of volunteers and their property (including vehicles) whilst they are on our premises or business, we would ask all volunteers to assist us in this matter should we feel that such a search is necessary.

- Searches will be carried out in the presence of another volunteer of your choice, who is available at the time of the search - This will also apply at the time that any further questioning takes place.
- We reserve the right to call the Police at any time.

## **SAFETY**

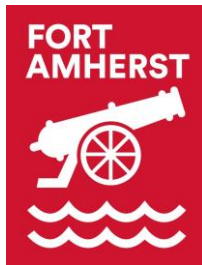
You should make yourself familiar with our Health & Safety policy and your own health and safety duties and responsibilities.

- You must not take any action that could threaten the health and safety of yourself, other volunteers, clients, paid colleagues, trustees or visitors to the site.
- You must report all accidents, incidents and near misses that occur whilst you are volunteering, no matter how minor. These must be recorded in the accident book/incident form provided for this purpose.
- You must ensure that you are aware of the fire and evacuation procedures and the action that you should take in the event of such an emergency.

## **STANDARDS OF DRESS**

As you are liable to meet visitors to the site it is important that you present a professional image with regards to appearance and standards of dress.

You should wear clothes appropriate to the volunteering tasks you are undertaking and clothing should be kept fresh, clean and tidy always.



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## ***WASTAGE & DAMAGE TO FORT PROPERTY***

We maintain a policy of “minimum waste” which is essential to the cost effective and efficient running of the Fort and is expected by our guests and visitors. You can promote this policy by taking extra care during your duties by avoiding unnecessary use of services and energy. The following points are illustrations of this:

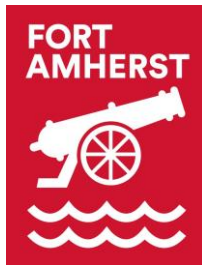
- Handle machines, equipment and stock with care.
- Turn off unnecessary lighting and heating.
- Keep doors closed whenever possible.
- Ask for other work if your tasks have come to an end
- Start any volunteering tasks with the minimum of delay after arriving at the Fort and again after any breaks.
- Any damage to stock, property or equipment that is the result of carelessness, negligence or deliberate vandalism will render you liable to pay the full or part cost of repair / replacement.
- Any loss to us that is the result of your failure to observe rules, procedures or instruction, or is because of your negligent behaviour will render you liable to pay for the full or part cost of the loss.

## ***VOLUNTEERS' PROPERTY***

We do not accept liability for any loss, or damage to, property that you bring onto the site. You are requested not to bring personal items of value onto the site and not to leave any items overnight.

## ***CONTACT DURING THE VOLUNTEERING DAY***

- You should discourage your friends and relatives from either calling on you in person or by telephone, except in an emergency.
- For those volunteers working within sight of the public, mobile phones should be set to silent or switched off whilst you are volunteering.
- You may use your personal mobile phone, but this should be minimal and must not impact on you or the other volunteers' working day, or the experience for our visitors.



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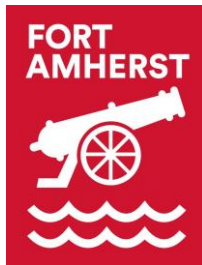
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## ***BEHAVIOUR WHILST VOLUNTEERING***

You must behave with civility towards visitors, fellow volunteers, staff, trustees and suppliers. **Absolutely no rudeness will be permitted towards paying guests or members of the public.**

- Offensive or insulting behaviour, or bad language may result in disciplinary action.
- You should use your best endeavours to promote the interests of the Fort. During your volunteering time with the Fort, you shall devote the whole of your time, attention and abilities to the Fort and its affairs.
- Any involvement in activities which should be construed as being in competition with us is not permitted, unless prior agreement has been given by the General Manager and the Board of Trustees.



# Fort Amherst Heritage Trust

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## **CAPABILITY PROCEDURES**

### ***INTRODUCTION.***

We recognise that during your volunteering time with us that your capability to carry out your duties may change. This can be for several reasons, the most common ones being that the volunteering role itself changes over time or your circumstances change and you can no longer complete the volunteering tasks.

### ***VOLUNTEER ROLE CHANGES / GENERAL CAPABILITY ISSUES***

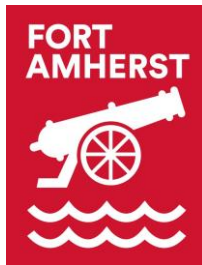
If the nature of your role changes or we have general concerns about your ability to perform the volunteer role we will try to ensure that you understand the level of performance expected of you and that you receive adequate training and supervision. Concerns regarding your capability will normally first be discussed in an informal manner and you will be given time to improve.

If your standard or performance is still not adequate you will be advised in writing that a failure to improve and maintain the performance required could lead to you being asked to terminate your volunteering role with the Fort. We will also consider the possibility of a transfer to a more suitable volunteering role if possible.

If there is still no improvement after a reasonable time and we cannot transfer you to a more suitable volunteer role, your volunteering time with the Fort will be ended.

### ***PERSONAL CIRCUMSTANCES***

Personal circumstances may arise which do not prevent you from volunteering, but which prevent you from carrying out your usual range of duties. If such a situation arises, we will work with you to investigate whether an alternative volunteering role may be more appropriate for you.



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## **DISCIPLINARY PROCEDURE**

### ***INTRODUCTION***

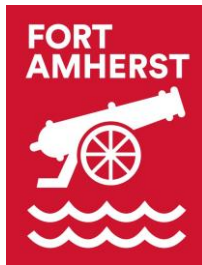
Sometimes issues may arise, about volunteer conduct at Fort Amherst. Problems or issues can often be addressed through supervision with a member of staff, additional training or support or redefining a volunteer's role. As an organisation, we encourage volunteers' development through offering specific feedback and identifying learning or action points for the future. This is seen as constructive feedback and part of a volunteer's development in their role and does not form part of the disciplinary procedure. However, if a complaint is made (and upheld) against a volunteer, or there is a case of serious misconduct, the following procedure will be followed. We will always aim to deal with issues as quickly as possible and to support volunteers through the process.

### ***STAGE ONE - INITIAL WARNING***

The volunteer will be written to and asked to attend a meeting, normally with the General Manager and a person of your choice. The inappropriate behaviour that the warning relates to and the action needed to put things right/standard of conduct expected in the future (and the time in which it should be achieved) will be clearly identified, as will any support/training to be provided by Fort Amherst Heritage Trust. The volunteer will also be told about their right to appeal. A written record of the warning will be given to the volunteer and a copy placed on the volunteer's file. When the matter is resolved and no further action is required then the case will be closed and details removed from the volunteer's file after 6 months.

### ***STAGE TWO – SECOND WARNING***

If there is no improvement, within the specified time, or there is further misconduct, the volunteer will be written to and asked to attend a meeting. The volunteer can bring someone along with them to this meeting. This meeting may result in a second warning being given, stating the reason for the warning, the action needed to put things right/standard of conduct expected in the future (including any support/training to be provided by Fort Amherst Heritage Trust) and the time in which it should be achieved. The volunteer will also be told about their right to appeal. A copy of the second warning will be kept on the volunteer's file. When the matter is resolved and no further action is required then the case will be closed and details removed from the volunteer's file after 6 months.



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## ***STAGE THREE - LEAVING AS A VOLUNTEER***

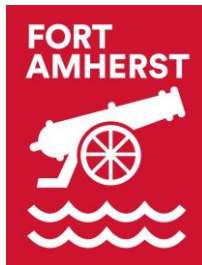
If there is no improvement, after the period of time specified in the Formal Written Warning, the volunteer may not be able to continue volunteering at Fort Amherst Heritage Trust or in a specific volunteer role. This does not normally affect the volunteer's right to access services at Fort Amherst Heritage Trust as a service user, although in some extreme cases a site ban may be appropriate.

## ***GROSS MISCONDUCT BY A VOLUNTEER***

Some types of misconduct are so serious, that a volunteer may be suspended whilst we investigate the situation. The volunteer will then be asked to attend a disciplinary meeting. The volunteer can bring someone along with them to this meeting and will have the chance to give their account/respond to the accusations. The panel at the meeting will decide as to whether the volunteer returns to volunteering or is asked to leave, as a volunteer.

## ***APPEALING A DECISION***

If you want to appeal a decision, at any stage of the disciplinary process, you should put your appeal in writing to the Trust Chairman within 30 days of receiving the decision. The Trust Chairman will then convene a panel to review the decision. The decision of this panel is final.



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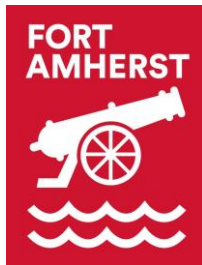
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## GRIEVANCE & COMPLAINTS PROCEDURE

1. It is important that if you feel dissatisfied with any matter relating to your volunteering time at the Fort you should have an effective means by which such a grievance or complaint can be aired, and where appropriate, resolved.
2. Nothing in this procedure is intended to prevent you from informally raising any matter you wish to mention with the General Manager or one of our Trustees. Informal discussion can frequently solve problems without the need for a written record. However, if you wish to raise a formal grievance or complaint you should normally do so in writing from the outset.
3. You have the right to be accompanied at any stage of the procedure by a fellow volunteer who may act as a witness or speak on your behalf to explain the situation more clearly.
4. If you feel aggrieved at any matter relating to your volunteering time (except personal harassment, for which there is a separate procedure following this section), you should first raise the matter with the General Manager or member of the Trust, explaining fully the nature and extent of your grievance or complaint. You will then be invited to a meeting at a reasonable time and location at which your grievance or complaint will be investigated fully. You must take all reasonable steps to attend this meeting. You will be notified of the decision, in writing, normally within ten working days of the meeting, including the right of appeal.
5. If you wish to appeal, you must inform the General Manager or member of the Trust within five working days of the receipt of the outcome letter. You will then be invited to a further meeting, which you must take all reasonable steps to attend. As far as is reasonably practicable, the Fort will be represented by a member of the Board of Trustees.
6. Following the appeal meeting you will be notified of the decision, in writing, normally within ten working days of the meeting.
7. We reserve the right to allow third parties to chair any formal hearing.



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## PERSONAL HARASSMENT POLICY & PROCEDURE

### A) INTRODUCTION

1. Harassment or victimisation on the grounds of age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy or maternity, race, religion of belief, sex or sexual orientation is unacceptable.
2. Personal harassment takes many forms ranging from jokes and abusive remarks to pestering for sexual favours, threatening behaviour and actual physical abuse. Whatever form it takes, personal harassment is always taken seriously and is totally unacceptable.
3. We recognise that personal harassment can exist anywhere and that this can seriously affect volunteer's lives by interfering with their performance whilst volunteering or by creating a stressful, intimidating and unpleasant environment.

### B) POLICY

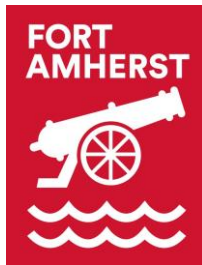
1. We deplore all forms of personal harassment and seek to ensure that the volunteering environment is sympathetic to all our volunteers.
2. We have procedures to inform volunteers of the type of unacceptable behaviours and provide volunteers who are the victims of personal harassment with a means of redress.
3. We recognise that we have a duty to implement this policy, and all Trustees, employees and volunteers are expected to comply with it.

### C) EXAMPLES OF PERSONAL HARASSMENT

Personal harassment takes many forms and volunteers may not always realise that their behaviour constitutes harassment. Personal harassment is unwanted behaviour by one person towards another, and examples of harassment include:

- a) Insensitive jokes and pranks
- b) Lewd or abusive comments about appearance or personal hygiene
- c) Deliberate exclusion from conversations
- d) Displaying abusive or offensive writing or material
- e) Unwelcome touching
- f) Abusive, threatening or insulting words or behaviours

These examples are not exhaustive and disciplinary action at the appropriate level will be taken against Trustees, staff or volunteers committing any form of personal harassment.



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## **D) COMPLAINING ABOUT PERSONAL HARASSMENT**

### 1. Informal complaint.

We recognise that complaints of personal harassment, and particularly of sexual harassment, can sometimes be of a sensitive or intimate nature and that it may not be appropriate for you to raise the issue through our normal grievance procedure. In these circumstances you are encouraged to raise such issues with a member of the Board of Trustees as a confidential helper. This person cannot be the Chairman of the Board of Trustees as that person will be responsible for investigating the matter if it becomes a formal complaint.

If you are the victim of minor harassment, you should make it clear to the harasser on an informal basis that their behaviour is unwelcome and ask the harasser to stop. If you feel that you cannot do this verbally then you should hand a written request to the harasser and your confidential helper can assist you in this.

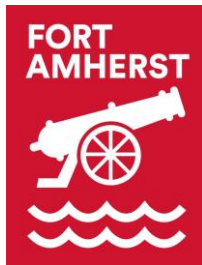
### 2. Formal Complaint.

Where the informal approach fails or if the harassment is more serious, you should bring the matter to the attention of the Board of Trustees as a formal written complaint and again your confidential helper can assist you with this. If possible, you should keep notes of the harassment so that the written complaint can include:

- a) The name of the alleged harasser
- b) The nature of the alleged harassment
- c) The dates and times when the alleged harassment occurred
- d) The names of any witnesses
- e) Any action already taken by you to stop the alleged harassment

On receipt of a formal complaint, we will take action to separate you from the alleged harasser to enable an uninterrupted investigation to take place. This may involve a temporary transfer of the alleged harasser to another area of the Fort or suspension from duty until the matter has been resolved.

The person dealing with the complaint will invite you to a meeting, at a reasonable time and location, to discuss the matter and carry out a thorough investigation. You have the right to be accompanied at such a meeting by your confidential helper or another colleague of your choice and you must take all reasonable steps to attend. Those involved in the investigation will be expected to act in confidence and any breach of confidence will be a disciplinary matter.



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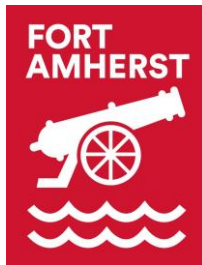
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On conclusion of the investigation, which will normally be within ten working days of the meeting with you, a draft report of the findings and of the investigator's proposed decision will be sent, in writing, to you and the alleged harasser.

If you or the alleged harasser are dissatisfied with the draft report or with the proposed decision this should be raised with the investigator within five working days of receiving the draft. Any points of concern will be considered by the investigator before a final report is sent, in writing, to you and the alleged harasser. You have the right to appeal against the findings of the investigator in accordance with the appeal provisions of the grievance procedure.

## **E) GENERAL NOTES**

1. If the report concludes that the allegation is well founded, the harasser will be liable to disciplinary action in accordance with our disciplinary and disciplinary dismissal procedures. A volunteer who receives a formal warning or is asked to end their volunteering time with the Fort may appeal by using our capability / disciplinary appeal procedure.
2. If you bring a complaint of harassment, you will not be victimised for having brought the complaint. However, if the report concludes that the complaint is both untrue and has been brought with malicious intent, then disciplinary action will be taken against you.
3. We reserve the right to allow third parties to chair any formal meeting.



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## **MOVING ON FROM FORT AMHERST HERITAGE TRUST**

Volunteering can be a great way of building up your skills, experience and confidence. Some volunteers stay with us for 6 months, whilst others stay with us for over 10 years. We encourage all volunteers to think about how volunteering fits with their long-term plans and personal goals.

### ***REFERENCES***

Once you have been an active volunteer for 6 months, we are happy to provide you with a reference for employment, other voluntary work or for a Further or Higher Education or Training Course. We can also write letters to support your applications for asylum or citizenship.

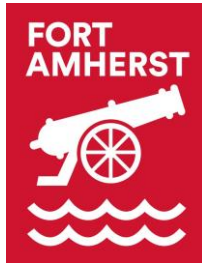
### ***RETURN OF OUR PROPERTY***

At the end of your volunteering time with us you must return all our property which is in your possession or for which you have responsibility. This includes hats, branded polo shirts and branded fleeces or any other item of clothing supplied in support of your volunteering duties at the Fort.

Failure to return such items will result in the cost of the items being charged to you. This is an express written term of you volunteering with us.

### ***LEAVERS' FORM***

We aim to offer a positive volunteering experience and encourage everyone who is moving on to complete a Leavers' Form. Your feedback enables us to continue to improve our volunteer programme and support volunteers effectively. We can also offer you a Leavers Meeting, if you feel that you would rather give us feedback face to face.



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## APPENDIX A

### FORT AMHERST CONFIDENTIALITY CLAUSE

Confidential information that is held in any form, written oral, visual or electronic format relating to the business, employees, volunteers, customers, affairs and finances of the Company / Trust is subject to this clause.

You may not at any time during or after termination of your employment / volunteering, unless authorised by the Company / Trust, use for your own or any other persons benefit or disclose to any authorised third party any confidential information relating to the customers, prospective customers, employees, volunteers, business affairs, finance or procedures of the company / Trust.

You are not permitted to make a copy, abstract, summary or précis of the whole or any part of any document belonging to the company / Trust except where expressly authorised to do so in the proper performance of your duties.

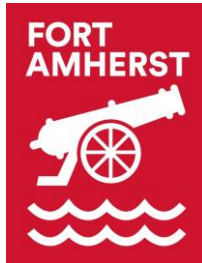
You are not permitted to post, link, like or in any other way endorse any online content relating to the Company / Trust, except where expressly authorised to do so in the proper performance of your duties. This includes but is not limited to online content such as Facebook, Twitter, Pinterest etc.

The company / Trust reserves the right to review all information held on the office PCs to ensure that they do not contain inappropriate material, and to assess the proper use of the internet and any other external communication networks.

Signed \_\_\_\_\_

Print name \_\_\_\_\_

Date \_\_\_\_\_



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## APPENDIX B

### COPYRIGHT RELEASE AGREEMENT

I, \_\_\_\_\_ (insert full name here) agree to assign copyright on the work I produce to (organisation name) in return for the sum of 50 pence.

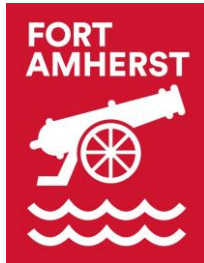
I understand that this means the organisation has control of copyright for material/work I produce, in a similar way to the control it has over material/work produced by a paid employee.

I understand that this sum is payment for copyright on material(s) I produce or have produced and is not a payment for work.

Signed \_\_\_\_\_

Print name \_\_\_\_\_

Date \_\_\_\_\_



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## APPENDIX C

### PHOTOGRAPHY CONSENT FORM

Fort Amherst Heritage Trust would like to take your/my child's photograph for promotional purposes. These images may be sent out to the media with a press release, used for our publications or on our website.

I agree to allow Fort Amherst Heritage Trust to take photographs of me/my child and grant permission for these to be used by Fort Amherst Heritage Trust and its project partners to promote Fort Amherst Heritage Trust in publications, press articles, promotional material and websites, exclusively for non-profitmaking purposes.

I also agree to my/my child's name being published in any associated publicity if required.

Yes  No

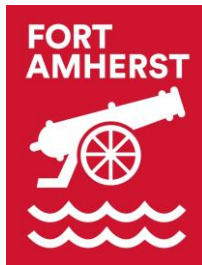
Children(s) Name(s) \_\_\_\_\_

Signed (Parent) \_\_\_\_\_

Print name( Parent) \_\_\_\_\_

Date \_\_\_\_\_

We will not use the images taken, or any other information you provide, for any other purpose.



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## APPENDIX D

### VOLUNTEER EXPENSE POLICY

Volunteers aren't paid for their time but may be paid for any out-of-pocket expenses, *provided these are agreed with the General Manager or Event Supervisor in advance*. If you incur expenses without prior approval from the General Manager or Event Supervisor you run the risk of these not being approved and paid.

These expenses may include (but are not limited to):

- travel
- incidental costs incurred on Fort business
- provision of essential equipment, such as protective clothing

Volunteers must provide receipts for any expenses they incur.

#### **Travel Expenses.**

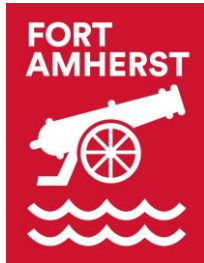
The Fort Amherst mileage allowance is 25p per mile which is the Inland Revenue rate for annual mileage claims up to 10,000 miles.

If necessary, taxi fares will be paid for volunteers returning home late at night after an event, *but this must be agreed in advance with the Event Supervisor*.

#### **Subsistence.**

Where volunteers are asked to assist with events lasting at least four hours, a snack and non-alcoholic drink will be provided by the Event Supervisor.

In addition, where the event lasts over six hours a hot meal and non-alcoholic drink will be provided by the Event Supervisor.



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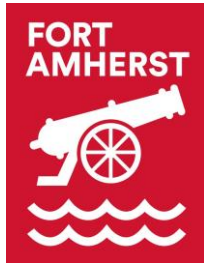
## APPENDIX E

### Notification of a Complaint or Grievance – Form and Process

Date complaint or grievance received:	
Complainant or grievance received by:	
Reference number:	
Name of Trustee assigned:	

### Details of complainant

Full name:	
Address:	
Telephone number:	
Email address:	
Preferred method of contact:	Email / phone / letter / face to face (Delete as appropriate)
Is the complainant	A visitor / a volunteer / a staff member / a trustee / a supplier (Delete as appropriate)



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## Details of complaint or grievance

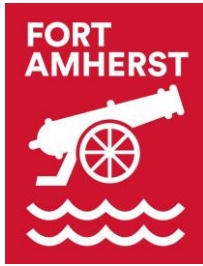
Complaint method	Email / phone / letter / face to face (Delete as appropriate)
Date of incident	
Time of incident	
Location of incident	
Nature of complaint or grievance and brief circumstances of the incident	

## Person(s) subject of the complaint or grievance

Name(s)	Role (e.g. Trustee, volunteer, staff member, contractor)

## Resolution steps

Complainant expectations (if known)	
Agreed action plan to resolve complaint or grievance	



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### Informal resolution.

This matter may be dealt with by means of Informal Resolution. This means that, with the agreement of the complainant, this matter will be dealt with as the Board of Trustees sees fit. The complainant will be notified, in writing, of how this matter was resolved.

If you agree to this matter being resolved by Informal Resolution please sign and date below.

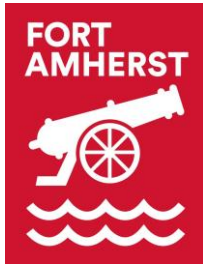
Signature	
Date	

### Closure of the complaint or grievance

To be completed in respect of the person subject to informal resolution.

I am fully aware of the details of the complaint or grievance made against me and I acknowledge that I have been served with a letter setting out details of the informal resolution.

Signature	
Date	



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## Complaint or grievance withdrawn or not proceeded with

I have discussed my complaint or grievance with \_\_\_\_\_ and I am satisfied with the explanation given and wish to withdraw / not proceed with (delete as necessary) my complaint or grievance. I accept that this will be any action to an end.

Signature	
Date	

## Outcomes of the complaint or grievance

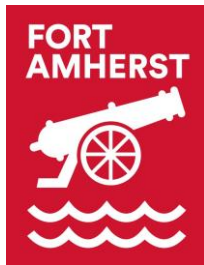
The following actions have been agreed as a result of this complaint or grievance.

--

## Trustee Review

Complaint or grievance reviewed by the responsible trustee and any learning for process / procedure / staff / volunteer training noted.

Signature	
Trustee Position	
Date	



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