



the National Trust  
for Scotland

a place for everyone

## **A welcome to our volunteers**

I would like to take this opportunity to welcome you to the National Trust for Scotland. The Trust was founded in 1931 to promote the care and conservation of Scotland's natural and built heritage, whilst providing access for the public to enjoy them. The future of this heritage depends on the ability of the Trust to meet ever-increasing demands and we can only do this with the help of volunteers. Your gift of time and energy is invaluable to the Trust and we want to ensure our partnership is a rewarding one for you too.

This handbook provides you with the essential information for volunteering with the Trust. In addition, you will be given information on the kind of volunteer work you have elected to do and, where appropriate, on the property with which you will be involved.

If you have any questions about your role, please speak to the member of staff or volunteer for whom you are working. General suggestions about the management, organisation and deployment of volunteers are welcomed by the Volunteering Department.

Finally, I do hope you enjoy working with us and that your contribution to the conservation of Scotland's heritage is an enjoyable and rewarding experience.

Thank you.

Violet Dalton  
Head of Volunteering

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## 1. Introduction

This handbook is designed to provide information on what to expect whilst volunteering with the National Trust for Scotland. The guidelines which follow explain the relationship between the volunteer and the Trust, and will help you understand your role as a volunteer.

## 2. Relationship between the Trust and a Volunteer

The National Trust for Scotland recognises that as a volunteer you have offered your time freely. There is however, an element of responsibility on both sides. It is important for you to understand both the benefits that you will gain from volunteering with the Trust, and the Trust's expectations of you as a volunteer.

On its part, the Trust undertakes to provide you with:

- A clear explanation of what you will be doing and why
- Appropriate training, supervision and support for your role
- A safe working environment
- Induction training and the opportunity to attend further training

As a volunteer, the Trust expects that you will:

- Maintain good relations with other volunteers, staff and Trust members
- Promote the Trust to visitors
- Adhere to the Trust's decisions, policies and procedures
- Be reliable and responsible at all times
- Work safely, both for your own sake and that of others
- Demonstrate high standards of work
- Attend training and support sessions as required
- Maintain confidentiality

It is important that you are well briefed on the role you are to carry out. The member of staff or volunteer who is ultimately in charge of your work will give guidance. A Volunteer Position Description outlining the specific duties of the role will also be available.

## 3. Expenses

Trust volunteers may claim reimbursement for agreed travel expenses, including mileage from home to the place of volunteering. The current mileage rate for volunteer claims is 23p per mile, however, some properties may have a maximum radius on which mileage allowance is based. You are asked to use the most cost effective mode of transport available and to be as environmentally friendly as possible. Due to the environmental impact of car travel and limited parking at some properties, we would encourage you to share car journeys or use public transport where possible. All expenses must be submitted on a

volunteer expenses claim form and receipts provided. Claims are usually submitted on a monthly basis, although other arrangements can be negotiated.

#### 4. Representing the National Trust for Scotland.

As a volunteer you are an important ambassador and should always represent the best interests of the Trust. For many visitors you are the “face” of the Trust, so please always extend a warm welcome and treat visitors with respect and courtesy.

#### 5. Who can become a Trust Volunteer?

The Trust has an equal opportunities policy for volunteers and therefore volunteering is open to all, regardless of sex, race, sexual orientation, disability, age, religion or political beliefs. Volunteer placements are made on the suitability of the volunteer to carry out the particular role in context of the location.

The Trust has no upper limit and does recognise the valuable contribution made by older volunteers in terms of knowledge and experience. For certain conservation tasks, there is a minimum age of 16. Certain activities are also restricted for those under 18 due to Health and Safety and child protection legislation. When enlisting the help of volunteers the Trust will always take into account the physical fitness of the volunteer, the nature of the role and the particular characteristics of the location of the work.

#### 6. Attendance

Regular attendance is important to the Trust in order to make sure that properties can operate smoothly and efficiently. We appreciate that you will make every effort to attend and arrive on time, but understand that unexpected events may on occasion prevent this from happening. If you are unable to attend on a certain day, please inform your volunteer co-ordinator or the property manager as soon as possible so that alternative arrangements can be made.

#### 7. Volunteer Records and Data Protection

The Trust holds volunteer details and work records to document the contribution made by volunteers overall and for health and safety purposes.

The Trust runs a ‘skills pool’ system of volunteers in some areas and may contact you with an invitation to attend specific events or to take part in volunteer roles that suit your particular skills and interests.

The Trust is registered under Data Protection Legislation. With your permission, we may use the data to keep you informed of other news and activities

concerning the National Trust for Scotland and the National Trust for Scotland Enterprises Limited.

#### 8. Recognition

The Trust recognises that the contribution made by its volunteers is significant, and that without volunteer input the Trust would not be able to meet its objectives. The Trust acknowledges this contribution and recognises that volunteers are equal partners in achieving the aims and objectives of the organisation.

#### 9. Volunteer Benefits

Volunteering is an exchange. Whilst the benefits that volunteers gain from their involvement with the Trust will differ from individual to individual, there are some tangible ways in which the Trust acknowledges the contribution made.

- Providing volunteer cards to volunteers who provide over 40 voluntary work hours within a year. The volunteer card gives free admission to all National Trust for Scotland and National Trust (England, Wales and Northern Ireland) properties. The card also gives a 20% discount on purchases made in National Trust for Scotland shops.
- Awarding long-service badges
- Giving sweatshirts to conservation volunteers who have provided over 45 hours of volunteer work per year for three consecutive years.
- A record of your volunteer involvement that may enhance your CV.

In addition, depending on the role and location, outings may be arranged as an additional 'thank you' to volunteers.

#### 10. Members' Centres/Friends of .... Societies

The Trust has always encouraged its members to join Members' Centres. These centres enable members to share interests, make new friends, find out more about the Trust and provide vital help through fundraising and practical work. Some Trust properties have Friends groups that are dedicated to or have a particular affinity with the property.

The Trust is seeking to increase membership of these groups. If you would be interested in joining a Members Centre or Friends Group, please contact the manager of the property where you are working or the Members Centres Co-ordinator at Wemyss House, 28 Charlotte Square, Edinburgh.

Trust properties are often a 'centre' for local communities and as such we welcome any support you can offer through your own or your employer's business in terms of sponsorship and/or events.

## 11. Induction and Training

Detailed and relevant information regarding your particular volunteer role will be provided at the location or property at which you will work.

Generally, you will receive induction or briefing at the same time as other volunteers and staff. Volunteers should receive the 'One Trust' induction as well as staff. During your time with the Trust you may be required to attend occasional training courses that will be relevant to your role within the organisation.

## 12. Health and Safety

In accordance with the Health and Safety at Work Act 1974, the Trust is responsible for ensuring, so far as reasonably practicable, the health, safety and welfare of all employees. In the area of safety, the Trust regards volunteers and members of staff in the same way. Each property has its own safe system of work (health, safety and environmental management system) and it is important that you understand your role within the system. A briefing on safe systems of work will be given at your induction. All staff and volunteers have a responsibility whilst at work to ensure that they do not put themselves or anyone else at risk. A copy of the Trust's safe system of work is available for reference at the property at which you will be working.

In the case of Conservation volunteering, a separate risk assessment for each project is drawn up.

Smoking. In line with current legislation, and for fire and health and safety reasons, smoking is not permitted within Trust buildings. This includes base camps, holiday cottages and other temporary place of residence. Volunteers will be advised if there is a designated smoking area at their place of work.

Breaks. Volunteers will be given tea breaks and lunch breaks appropriate to their designated role and hours worked.

## 13. Insurance

The National Trust for Scotland has employer's liability insurance cover in place for all its personnel, including all volunteers, whilst engaged in voluntary work or associated activities connected with the Trust.

Motor Insurance: All Trust vehicles and hired vehicles are comprehensively insured for any driver who has been given authorisation to drive by a Trust representative.

A Driver's Declaration Form must be completed by all persons who are required to drive a Trust vehicle or a vehicle hired by the Trust, and this form, together with a copy of the volunteer's driving licence is submitted to Central Office, 28 Charlotte Square, Edinburgh. All Motor Accidents must be reported immediately to the Trust's Motor Insurers in accordance with the procedure set

out in the Vehicle Information Pack provided in all Trust-owned vehicles. Failure to notify the Trust's Motor Insurers of driving convictions can invalidate insurance protection and it is therefore essential that any volunteer who receives such a conviction must inform the Trust immediately. Such information will be treated in the strictest of confidence.

**Personal Belongings:** The Trust cannot accept liability for any personal items on Trust property belonging to staff or volunteers. The personal belongings of staff and volunteers are not insured by the Trust, and all personal items should be covered under each individual's own personal insurance policy.

#### 14. Confidentiality

During the course of your volunteer work with the Trust you may be party to confidential information about Trust activities that is not in the public domain. You are asked to keep such information confidential and not to communicate it outside of the Trust.

#### 15. Dispute Resolution

The National Trust for Scotland aims to treat all staff and volunteers fairly and objectively. We do recognise that situations may arise from time to time which volunteers or staff working with volunteers need assistance to resolve. If you have a problem concerning any aspect of your voluntary work, we ask that you take this up directly with the member of staff or volunteer who is responsible for your work. If this does not result in a mutually acceptable resolution of the difficulty, further advice should be sought from the Head of Volunteering or from the Human Resources department.

#### 16 Employment Opportunities

Volunteers with the appropriate experience and qualifications are welcome to apply for any vacancies within the Trust. Managers are advised of all vacancies, which they then post on both departmental and general notice boards.

#### 17. Keeping in touch

From time to time the Volunteering Department will send out information to all volunteers who are currently registered with us and have provided an email address. This is generally news of events and newsletter that the National Trust for Scotland has organised. If you would like to be added to this contact list please email **volunteering@nts.org.uk** with the words 'add me' in the title.

Volunteers should also look out for Trust-wide newsletters and communication on display at their property.

18 And Finally..

Becoming a National Trust for Scotland Volunteer will provide you with all kinds of new and exciting opportunities. We hope that through your work with us you will learn new skills, meet new people, explore some of our stunning properties and experience something completely removed from your usual routine.

Thank you for your time and commitment to volunteering with the National Trust for Scotland. Your enthusiasm and dedication makes a huge difference to the conservation and preservation work of the organisation.

Violet Dalton  
Head of Volunteering  
February 2009



The National Trust  
for Scotland

## Volunteer Expense Claim

### SECTION A : To be completed by claimant

Name (block Capitals)	Property:	Expense Account :				
		F				

**Receipts** : Please obtain receipts where possible. **The Trust requires receipts for audit purposes and in order to recover VAT.** (Suppliers, if requested, are obliged by law to provide a valid VAT receipt, which for practical purposes means they should show the VAT registration number). **Please staple and number your receipts to this form.**

Address to which payment is to be sent: (Please complete)	
	Post Code :

Bank details ( for first claims & change in bank details ). Payment can also be made by cheque.

Bank :	Branch :
Sort Code :	Account Number :

### Details of Expenditure Claimed :

(HQ Only)

Date :	Description :	Car Miles:	Receipt No	£	Account	Area/ Activity	Sub-code	VAT	Net
<b>Total Claimed</b>				£					

Claimed By :	Date :
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### SECTION B : For Line Manager Use Only

	Signature :	Print Name :	A/C Period :	Date :
I approve the attached expense claim :				

### SECTION C(a) : For Finance Manager Use Only

	Signature :	Print Name :	A/C Period :	Date :
I have checked this expense claim :				

### SECTION C(b) : For Purchase Ledger Use Only

	Signature :	Print Name :	A/C Period :	Date :
I have processed this expense claim :				



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## **VOLUNTEER POLICY**

### **INTRODUCTION**

1. This policy sets out the broad principles by which the National Trust for Scotland will promote, manage and recognise the involvement and contribution of volunteers.
2. This policy and its implementation will be reviewed annually to ensure it remains appropriate to the needs of The National Trust for Scotland and its volunteers. The Leadership Team, through the Head of Volunteering, is responsible for fostering a climate which encourages, respects and values the contribution of all volunteers and for ensuring that the needs of the volunteer are integrated into the Trust's policies and practices.

### **VISION**

3. The National Trust for Scotland's commitment to people and places will be expressed through active partnerships with individuals and groups reflecting the volunteering vision and spirit of its founding purpose and position as Scotland's leading voluntary conservation charity. It is recognised that the volunteer programme is central to the organisation maintaining and achieving its vision.

### **COMMITMENT TO VOLUNTEERING**

4. The voluntary principle on which The National Trust for Scotland is based is one of its greatest strengths. Volunteers are an established and integral part of the life and success of the Trust. The National Trust for Scotland is committed to working with volunteers at all levels of Trust activity and welcomes and values their contribution to the achievement of its aims and objectives. Their involvement in the work of the Trust should at all times be promoted at national and local level.

### **DEFINITION OF VOLUNTEERING**

5. A volunteer is a person who undertakes unpaid work for the Trust freely and by choice without concern for financial gain. Volunteers include Members of Council and Committees, Assistants and Guides at properties, Conservation Volunteers, participants in Thistle Camps and St Kilda Work Parties, students and volunteers who promote the Trust's interests in local communities.
6. Volunteering covers all aspects of the Trust's work from participation in its governance through

membership of Council and Committees to the work of volunteers at many different levels throughout the organisation.

## VALUES AND PRINCIPLES

7. The National Trust for Scotland:
  - a. Values volunteering as integral to its work at all levels and recognises the contribution of volunteers as fundamental to its well-being and success.
  - b. Values volunteering as an inclusive act of participation that is in itself important in promoting the Trust's work.
  - c. Sustains the distinctiveness of places it protects through the practical involvement of volunteers from local community groups.
  - d. Appreciates that volunteering is enjoyable and can change and enrich people's lives while bringing wider benefits to society.
  - e. Recruits volunteers with skills, knowledge and experience to match the needs of the Trust and recognises their motivation, aspirations and need for fulfillment in being involved in the work of the Trust.

## VOLUNTEER RELATIONSHIP WITH THE NATIONAL TRUST FOR SCOTLAND

8. The relationship of the volunteer to the Trust is one bound by trust, mutual understanding and benefit; it is a 'gift' relationship, with time given freely and willingly, without expectation of financial reward by the volunteer. Neither the volunteer nor the Trust regards the relationship as a contract of employment.
9. No enforceable obligation, contractual or otherwise, can be imposed on the volunteer to attend, give or be set a minimum amount of time or carry out the tasks provided. Likewise the Trust cannot be compelled to provide regular work or benefit for any activity undertaken.
10. The relationship is based on the principle that volunteers add value to the Trust's work by performing a wide range of roles, and by contributing time, specialist skills, and a flexible approach.
11. Although volunteers offer time freely and willingly and without binding obligation, there is a presumption of mutual support and reliability. Reciprocal expectations are acknowledged including the attainment and maintenance of the high standards on which the Trust's reputation depends and an adaptability to changing requirements.

## RESPONSIBILITIES FOR POLICY IMPLEMENTATION

12. Having been approved by Council, the responsibility for the day-to-day execution of the policy rests with the Head of Volunteering who is responsible to the Trust's Leadership Team, through the Director of HR and Change. The Head of Volunteering has functional responsibility for the

Trust's national volunteering programme, for the delivery of Trust policy and for ensuring that the management of volunteers is in line with Trust practice and procedural guidelines.

13. Each member of the Leadership Team has a responsibility for the promotion, development, planning and management of volunteering within his/her area of line management
14. Property Managers and Heads of Department are responsible for the effective day-to-day deployment, involvement and acknowledgement of voluntary activity at property and departmental level on the basis of agreed guidelines.

#### THE TRUST'S EXPECTATIONS OF ITS VOLUNTEERS

15. The Trust recognises that volunteers seek to make meaningful contributions which use their skills and experience and which provide opportunities for personal development and satisfaction. While respecting that volunteers will seek fulfilment from being involved in a particular aspect of its work, the Trust expects volunteers to be committed to its corporate objectives. Volunteers must comply with expected standards of practice, attend training when appropriate and behave with respect towards its members, visitors, staff, and other volunteers.
16. Volunteers will be expected to respect the Trust's need for confidentiality and the sensitive handling of information regarding its work and objectives, particularly where such information is not in the public domain.

#### INVOLVEMENT, DEVELOPMENT AND MANAGEMENT OF VOLUNTEERS

17. The Trust is committed to the involvement, management and development of volunteers. This commitment is underpinned by policies and practices which meet the standards recommended by the National Training Standards Organisation for Volunteers Managers.

##### a. Recruitment and Selection

- (1) The Trust is committed to equal opportunities and believes that volunteering should be open to all regardless of sex, race, disability, marital status, sexual orientation or age. While seeking to involve people of all ages and ability, the Trust reserves the right to specify age limits and to define physical ability to ensure it complies with statutory and other externally imposed duty of care obligations. While specified limits will predominantly apply to volunteering of an outdoor, 'adventure' nature, other facets of involvement in the Trust's work will equally be governed by the Trust's commitment to and responsibility for the health, safety and general well-being of its volunteers, staff and general public.

- (2) The Trust will recruit volunteers with the skills, knowledge, experience and attitude to match its needs and goals. Individuals interested in volunteering will be treated in line with the Trust's recruitment and selection practices and procedures. Volunteers will be provided with a position description for the role they are applying for and will be required to complete a volunteer application form. Where appropriate, references will be sought, with a Disclosure, (criminal record and background check) being carried out when volunteering involves contact with children, young people and/or vulnerable adults, in line with the Trust's Disclosure Policy.

b. Training and Development

- (1) The Trust is committed to the appropriate training and development of its volunteers to ensure their involvement helps the Trust achieve its aims and objectives. Volunteers will receive induction training when they join the Trust, and further training appropriate to their role, during their time with the Trust.
- (2) Volunteer induction training will cover the aims and objectives of the Trust as expressed in the Corporate Plan, the workings of their team, at both regional/divisional and property/department level, and the purpose and expectations of their role as a volunteer.
- (3) Volunteers will be included, and expected to participate, in Health and Safety training. Volunteers will also be expected to undertake training that focuses on improving service to Trust customers, be they members, property visitors or retail and/or catering customers.
- (4) To help them achieve more and to ensure their performance meets the standards required by and expected of the Trust, volunteers will be encouraged to develop their skills through coaching, on-the-job training and formalised training courses as appropriate.
- (5) Volunteers need and are entitled to receive feedback on their performance. In addition to active guidance and feedback about specific tasks, staff and volunteers involved in the supervision of volunteers are encouraged to carry out appropriately structured reviews of general performance, including the identification of training and development needs.

- c. Recognition. The Trust acknowledges that although volunteers do not seek reward they do appreciate and are deserving of recognition. Appreciation of the efforts of volunteers should be expressed by line managers and by such tangible methods as the issue of volunteer cards, badges and appropriate discounts. In addition, the Trust will seek ways to publicise and recognise the collective contribution of its volunteers.

d. General Management, Communication and Volunteer Relations

- (1) Volunteers will be treated fairly and consistently as an integral part of the team. While acknowledging the nature of the relationship between the volunteer and the Trust, line managers will interact with volunteers in the same way as with staff, adapting their management style as appropriate.
  - (2) Trust staff, at all levels, will seek and follow appropriate routes to ensure volunteers are included in the communication process, both in terms of involvement and participation and in receipt of information.
  - (3) In common with paid staff, volunteers have the right to seek the advice and support of the Human Resources department in all matters pertaining to their relationship with the Trust. In the event of a complaint about a volunteer or a grievance by a volunteer, the matter must be handled sensitively and timeously, with the volunteer's point of view sought, listened to and included in any action required to be taken by the Trust.
  - (4) Staff involved with volunteers will be trained to enable them confidently and competently to involve, support and manage the effective contribution of volunteers.
- e. Health and Safety
- (1) The Trust has a duty to all staff, volunteers, contractors, visitors and others who may be affected by its activities and its aims to protect all from risks to their health and safety as far as is reasonable.
  - (2) The Trust aims to provide a safe and healthy working environment for all and employees and volunteers are expected to co-operate fully. The Trust will provide the same standard of care for both staff and volunteers. Volunteers have a statutory duty to co-operate with the Trust in the implementation of its Health and Safety Policy and to ensure that they carry out their work without risk to themselves or others and to report risks to their supervisors.

#### PROCEDURAL GUIDELINES

18. Detailed guidelines on the recruitment, selection, training, development, recognition and general management of volunteers are contained in the Trust's Volunteer Handbook. Full details of administrative procedures pertaining to volunteer records, insurance, travel/expense claims, protective clothing etc., are also contained within the Handbook.

For further information please contact:

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