PEMBROKE DOCK HERITAGE TRUST

GRIEVANCE POLICY

2022 EDITION

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1. INTRODUCTION

1.1 Pembroke Dock Heritage Trust is the official body which manages the town's Heritage Centre (hereby referred to as the 'Museum') in the restored Royal Dockyard Chapel opened by Her Majesty the Queen in 2014. The Museum is the culmination of a long and successful series of heritage initiatives which brought the military connections with the town and area into local, national and international focus. The Trust's aim is to advance education for the benefit of the public through the establishment and maintenance of a museum pertaining to the history, heritage and culture of Pembroke Dock and the surrounding area.

1.2 Pembroke Dock Heritage Trust is committed to providing a safe and healthy working environment, and to promoting the well-being of its employees and volunteers. However, it is recognised that from time-to-time employees and volunteers may wish to raise a concern they may have in connection to their work.

1.3 The aim of this policy is to enable employees and volunteers (hereafter referred to as 'staff') to air any concerns that they have about practices or treatment from other individuals at work, and, where a genuine problem exists, to ensure that these concerns be resolved as quickly and as fairly as possible.

1.4 This policy sets out detailed guidance on the Grievance procedure.

2. DEFINITIONS

2.1 Grievances are concerns, problems or complaints that staff may raise with the Trust during the course of their employment or volunteer work. They may refer to:

- Terms and conditions of employment
- Health and safety
- Work relations
- Bullying and harassment
- Working practices
- Working environment

- Organisational change
- Discrimination

2.2 This policy does not apply to concerns relating to staff performance and conduct, in these instances, managers should refer to the Disciplinary Policy.

3. INFORMAL RESOLUTION

3.1 It is anticipated that in most circumstances staff will be able to discuss and resolve daily working concerns informally in a supportive atmosphere, through discussion between the staff and their immediate line manager. In some circumstances the involvement of an appropriate third party may be appropriate to ensure expediency in resolving differences of opinion.

3.2 There may be occasions, both in the case of informal and during the formal grievance process, where a manager other than the staff member's direct line manager should deal with their grievance.

3.3 It is anticipated that any informal action should be documented and will be taken in a reasonable timescale that is practicable in the circumstances.

3.4 Submission of a grievance in writing does not automatically mean implementation of the formal process. Both staff and managers should fully consider the possibility of informal resolution before moving to the formal process.

4. FORMAL PROCESS – STAGE ONE

4.1 If the grievance has not been resolved at the informal stage or should the matter be deemed appropriate to be addressed at formal stage 1 an individual must put their grievance in writing to their line manager or Trustee as appropriate. This may either be in the form of a formal letter or e-mail.

4.2 The manager will then provide timely acknowledgement of the grievance and invite the staff member to a meeting.

4.3 In setting a date for the meeting, managers should take reasonable consideration of the need for the staff member to arrange for someone to accompany them. The staff member should confirm their availability and that of their companion as soon as possible. Section refers to the right to be accompanied.

4.4 Should the initial date suggested by the manager not be possible, then a new date should be arranged without unreasonable delay.

4.5 At the meeting the staff member will be able to explain their grievance and provide any further relevant evidence to support their grievance. It is their responsibility to fully explain their grievance as well as provide realistic options they have considered by way of reaching a resolution.

4.6 At the meeting the manager should establish whether specialist advice needs to be sought, whether it is necessary to interview anybody else or any further investigation is necessary to obtain further facts before reaching a decision.

4.7 It is recommended that the outcome to a staff member's grievance is communicated to them within one calendar week of the meeting. In some instances, this may not be possible due to the nature of the allegations disclosed and any further investigation required. Where it is unlikely that the matter will be resolved within one week (in the case of a formal investigation, for example), the staff member will be notified and a likely timescale for resolution will be given.

4.8 Upon conclusion of the investigation and/or grievance, the manager will determine whether it is appropriate to meet with the staff member in the first instance to provide detail of their findings and conclusion or whether a letter providing detail of their findings and conclusion is sufficient in the circumstances. Should a meeting be held to inform of the outcome, this should still be confirmed in writing.

4.9 The written outcome must contain details of the outcome itself, the rationale behind it, as well as any key points that were agreed.

4.10 The individual must also be notified of their right to appeal against the decision made from the formal stage one process.

4.11 Notes of the meeting must be taken and shared with all parties.

5. FORMAL PROCESS – STAGE TWO

5.1 Should a staff member feel that their grievance has not been resolved at stage one, they can pursue their grievance and appeal at stage two. A letter confirming their wish to do so must be submitted within 2 weeks of the date of the letter sent to the staff member confirming the manager's written outcome at stage one.

5.2 The staff member's disagreement with the decision is in itself insufficient grounds for appeal. A letter outlining an appeal must state a staff member's full grounds for doing so and must cover one or both of the following:

- New evidence that was not previously available, enclosed with the appeal letter
- Failure to follow correct procedure, with clarification of how the staff member feels this applies.

5.3 Stage Two should be conducted by a manager not previously involved with the grievance, ideally senior to the manager who conducted Stage One. Consideration should be given, dependant on the circumstances, as to whether it may be appropriate for the manager who heard the grievance/undertook the investigation and/or the Specialist Advisor to attend part of the meeting.

5.4 The staff member will be given at least one week's written notice of the stage two meeting, and of their right to be accompanied as with Stage One.

5.5 At the Stage Two meeting, the staff member will state their reason for wishing to progress to this stage.

5.6 The staff member will have the opportunity to provide any further information before the meeting is adjourned and a decision reached.

5.7 There will be no further investigation into the original allegations unless new evidence is submitted which would necessitate this.

5.8 It is recommended that the outcome to a staff member's grievance is communicated to them within 2 weeks of the meeting. If for any reason this is to be delayed because further investigation is necessary, this will be communicated to the staff member.

5.9 The written outcome will provide the rationale for the decision, which will be one of the following:

- Confirmation of the original decision
- A substitution of the original decision for a different outcome.

5.10 There may also be further recommended actions. There is no further right to appeal an outcome at Stage Two.

6. VEXATIOUS OR MALICIOUS GRIEVANCES

6.1 A staff member may raise a grievance that, through investigation, proves to be vexatious or malicious. In these circumstances the staff member raising the grievance may find themselves subject to disciplinary action.

7. REVIEW

7.1 These policies were last reviewed in May 2022, and they should be reviewed every three years.

Signed

Name GK Clarkson

Appointment Chair of Trustees on behalf of the Board of Trustees

Date May 2022