| SAMA 82 | Controlled Document |
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# The South Atlantic Medal Association (1982)

# STAFF HANDBOOK

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| **Policy Number** | 13 |
| **Document Owner** | SAMA (82) |
| **Ratifying Body** | Board Of Trustees |
| **Policy Lead** | Brian Sherrington |
| **Available (upon approval) to** | Members and Volunteers |
| **Next Scheduled Review Date** | 02/09/2028 |

**POLICY CONTEXT & REQUIREMENT**

This policy has been developed to protect the organisation, employees, trustees, membership and volunteers by ensuring that there clear HR policies and procedures in place to allow the SAMA (82) to run effectively in achieving its objectives.

| Version Control | | | | |
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| Version | Author | Status | Date | Change Detail |
| 2.0 | Andrew Lockett | Implemented | 02/09/2024 | N/A |
| 2.1 | Alan Dodsworth | Implemented | 19/08/2026 | New Front Page, Policy Lead & Version Control |
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1. **Introduction**
   1.1. This handbook is designed to provide general information about terms of employment, personnel matters and procedures.
   1.2. The terms company, charity, association and organisation all refer to the South Atlantic Medal Association (1982) (SAMA82) unless otherwise described.
2. **Scope**
   2.1. The handbook applies to trustees and employees of the charity.
   2.2. This staff handbook came into force on 28 January 2019 and was revised 30 October 2020.
3. **Quality Policy**
   3.1. The staff handbook is primarily to assist trustees in their day-to-day objectives for the charity and company in providing a service to the beneficiaries, members, visitors and members of the public or other organisations who contact the Association.
4. **Objectives of the Charity**
   4.1. These are set out in the articles and memorandum and Policy 9.
5. **Equal Opportunities – Unjustifiable discrimination**
   5.1. Trustees and staff shall ensure that they conduct the business of the Association in accordance with current legislation. Trustees and employees are to ensure that they operate no unjustifiable discrimination and offer equal opportunities where this is practicable.
6. **Leadership and Control of the Association**
   6.1. The trustees collectively have the ultimate responsibility for directing the affairs of the Association.
7. **Employment Records**
   7.1. In respect of the association secretary, personal details will be held by the chair or an appointed trustee. Any changes to these personal details must be reported as soon as practicable, in writing.
   7.2. The personal details of the administrative assistant will be held by the association secretary and any changes to personal details must be reported in writing to the secretary.
   7.3. With respect to the financial matters and records, these will be controlled, retained and destroyed/deleted by the treasurer.
   7.4. To comply with company law and accounting requirements, the costs of the Association's employment arrangements will be made available for public scrutiny.
8. **Staff Induction**
   8.1. When employees are appointed, it is important that they learn the practices and procedures as quickly as possible. The induction programme also reduces the level of anxiety naturally felt by a new employee. A written programme of induction shall be prepared for all new employees.
   8.2. The induction procedure will commence on the first day of employment and will comprise of:
      8.2.1. welcome and introduction,
      8.2.2. formalities e.g. contract of employment,
      8.2.3. general outline of the business of the charity, objectives & charity rules,
      8.2.4. working practices and procedures,
      8.2.5. personnel matters and the staff handbook,
      8.2.6. Trustee arrangements,
      8.2.7. company documentation,
      8.2.8. health, safety, environment and security.
9. **Hours of Work**
   9.1. Hours of employment are as specified in the terms and conditions of employment (contract). For pro rata calculations the full time hours are 37.5 hours per week.
   9.2. Core hours for the office to be available for contact use are:

9.2.1. Monday, Tuesday and Thursday except statutory holidays of New Year's Day, Good Friday, Easter Monday, Early May Bank Holiday, Spring bank holiday, Summer bank holiday, Christmas Day and Boxing Day,

9.3. on staffed days the hours between 10:00 and 13:00,

9.4. outside staffed hours an emergency contact access shall be provided by speech or text to an announced number,

9.5. exceptionally, with the agreement of the trustee managing the office, the office may be left unstaffed provided there is a good reason for doing so and other contact arrangements are in place.

**10. Holidays**

10.1. Definitions used:

10.1.1. statutory holiday – those days listed in Annex B.

10.1.2. annual leave or annual holiday – the 20 + days provided to employees to be taken at a time of their choosing and usually used in whole weeks or groups of days.

10.2. The holiday year runs from 1st January to 31st December each year. Employees must take their full statutory and annual leave entitlement in the holiday year. Holiday entitlement, statutory or annual, cannot be carried forward from one year to another and no holiday pay is payable for any holidays not taken during the course of the holiday year except in the year an employee leaves the employment.

10.3. Where exceptional national conditions prevail, holiday arrangements and requirements may be adjusted by the trustee managing the office.

10.4. Employees, starting their employment, are entitled to 20 annual leave days per calendar year and 8 statutory holidays both on a pro rata basis as explained in Annex A. The resulting days are converted to hours for the purpose of obtaining a fair and flexible application of leave and are accounted for using the hours method. Where an employee joins or leaves the employment part way through the calendar year, the entitlement shall be reduced by the ratio of days in employment divided by the days in the year (365 or 366) for the year of leaving or joining.

10.5. Annual leave entitlement will increase by 1 day each year for the first 5 years of service, then by 1 day every 5 years of service.

10.6. Statutory holidays - those listed in Annex B.

10.7. The Association Secretary shall submit his/her request for holiday leave to the trustee with delegated duties for the office. Notice should be given, equal to twice the length of the holiday requested.

10.8. The Administrative Assistant shall submit his/her request to the Association Secretary. Notice should be given, equal to twice the length of the holiday requested.

10.9. In exceptional cases the trustee managing the office may permit both employees to be on annual leave during the same extended period (two days or more).

**11. Management of Overtime, Sickness Time, TOIL and Holiday (leave)**

11.1. Definitions;

11.1.1. Over time – additional working of hours, in excess of normal hours, to achieve the demands of the workload. These hours must be previously authorised by the trustee managing the office and is limited to 8 hours per month per employee. Exceptionally a higher number of hours may be authorised. There is no requirement for employees to work overtime if they do not wish to do so.

11.1.2. TOIL – This is an acronym for "time off in lieu" and is non-contractual. Employees may work extra hours outside their normal hours and store these for later use for time off. The purpose of this arrangement is to foster a sound work-life balance and to enable the Association to deal with peak workloads. TOIL should be taken within 4 weeks of its

creation. There is no requirement for employees to use this system and participation is purely voluntary.

11.2. TOIL – arrangements. An employee may not store more than 20 hours and should use the hours stored within 4 weeks of its creation. An employee shall only be permitted to carry forward a maximum of 9 hours into the next year.

**12. Keeping Records and Reporting**

12.1. Each employee has the duty of recording their hours worked on a daily time sheet.

12.2. Following the end of each calendar month, the association secretary is to report weekly hours and information for each employee, in the following categories:

12.2.1. total hours worked,

12.2.2. annual and bank holiday leave taken in both number of hours and number of days (related by 6 hours),

12.2.3. sickness absence hours or days,

12.2.4. number of hours worked with prior authorisation for overtime pay.

12.3. This information is to be sent to the trustee managing the office and the treasurer by email early in the following month to cover the preceding month.

**13. Sickness**

13.1. It is the duty of the employee to report absence due to sickness. In the case of the association secretary the absence is to be reported to the trustee managing the office or in their absence the chair or the appointed person. In the case of the administrative assistant the absence is to be reported to the association secretary or a trustee.

13.2. Payment at contracted wage rates will be made for the first 31 days of absence in any calendar year based at the prevailing working hours in place at the time of the sickness commencement. The period of paid absence commences on the first day of sick leave and continues contiguously until up to 31 days after the start of sick leave or end of sickness absence whichever is the shorter and includes normal days off and weekends. Further sickness absence will be dealt with under the statutory sick pay scheme (SSP) – annex C.

13.3. If the employee is absent from work as a result of or in consequence of an accident at work and subsequently pursues a claim for monetary damages, the employee shall be liable to reimburse the Association for any sick pay paid during any period of absence attributable to such accident.

13.4. When returning to work following an absence through illness, the employee will be required to either provide a fitness note or to complete a self-certification Form. Generally, any period of sickness for 5 working days or less can be certified by completion of a self-certification form immediately on return to work. Sickness absences exceeding 5 working days must be supported by a doctor's certificate. This certification is to be transmitted to the trustee managing the office and the treasurer. Pay or SSP can only be paid with the appropriate certificates being completed and submitted.

13.5. For employees whose contractual hours are less than 37.5 hours a week, the entitlements are calculated by using factor P = N/37.5 where N is the weekly hours being worked at the time of commencement of sickness.

13.6. Any requests for compassionate/carer's leave will be at the discretion of the trustees.

**14. Salary Payments**

14.1. Employees are paid monthly, in arrears. Payment will be made by cheque or bank transfer and all statutory deductions will be made at source.

14.2. Wages are normally paid on the 25th of the month except December and where weekends occur on the 25th of the month. In December the payment is usually made a week earlier and if the 25th of the month occurs at the weekend then wages are paid on the weekday before or after the weekend.

14.3. Employees may, if they wish, have payments made directly into a bank account specified by them and after providing the treasurer with the appropriate details.

14.4. Payment of overtime shall be paid two months in arrears.

14.5. Employees must notify the treasurer of any changes to their circumstances.

**15. Discipline and Grievance Procedures**

15.1. The purpose of this section is to clarify the relationship between the employee and the employer (trustees) so that they each understand their rights and obligations. The aim is to reconcile justice for the individual with the need for efficiency.

15.2. The rules and procedures contained in this handbook may be updated from time to time by the trustees in line with any changes to legislation.

15.3. Unsatisfactory performance, however identified, or any breach of rules and procedures by the employee will be dealt with in accordance with this document.

15.4. Minor breaches of discipline or instances of poor performance will be dealt with in the first instance informally by the immediate supervisor. (In the case of the administrative assistant this will be the association secretary, and for the association secretary this will be the nominated trustee). The breach/poor performance will be discussed to see if the employee can be assisted to remedy the breach, avoid repetition, or improve his/her performance as the case may be.

15.5. In the event of there being a repetition of any minor breach of discipline or further instance(s) of poor performance, the matter will be brought to the attention of the trustees. Following investigation, the matter will be considered by the (nominated) trustees at an interview with the employee concerned. The trustees may issue a verbal warning which will be noted on the employee's personal file.

15.6. If the misconduct or poor performance is repeated or persists, the matter will again be brought to the attention of the trustees. Following investigation, the matter will be considered by the trustees who may issue a verbal warning, or where such warning has previously been issued, a written warning may be given. The written warning will remind the employee that further persistence could lead to dismissal. If the misconduct or poor performance persists after a verbal and written warning the employee is liable to dismissal and will be given written reasons by the trustees.

15.7. More serious breaches of discipline or misconduct may lead directly to the issue of a written warning, notwithstanding that no verbal warning has been given and, in cases of gross misconduct, the employee may be dismissed notwithstanding that no verbal or written warnings have been given.

15.8. Gross misconduct is behaviour which is so in breach of the employee's obligations as to lead a reasonable person to expect the termination of their employment. The following are examples to illustrate the type of conduct in question, but the list is not exhaustive and does not limit the right of the trustees to treat other misconduct as gross in appropriate cases:

15.8.1. Refusal to carry out reasonable management/trustee instructions.

15.8.2. Gross incompetence in carrying out any of the functions which the employee is employed to discharge.

15.8.3. Unjustifiable discrimination against beneficiaries, members, colleagues or visitors/callers.

15.8.4. Presence at work in an unfit state to meet the needs of the employment (e.g. drunkenness/non prescribed drug taking).

15.8.5. Commission or involvement of external offences of dishonesty or violence.

15.8.6. Conduct during or outside of hours of employment likely to bring the employer into disrepute.

15.8.7. Breaches of legislation governing the workplace (e.g. no smoking rules).

15.8.8. Harassment, bullying or other unjustifiable hostility.

15.9. At each stage of the disciplinary process or on an appeal the following will apply:

15.9.1. the employee will be entitled to be accompanied by a fellow employee or friend of his/her own choice but not a person of legal standing,

15.9.2. the employee will be informed of the complaint against her/him and be invited to state her/his case,

15.9.3. the trustees will undertake such investigation as it deems appropriate. The decision will be communicated to the employee as quickly as possible thereafter, giving reasons for any disciplinary measures taken. If the employee has any right of appeal he/she will be reminded of it,

15.9.4. an employee may appeal against any disciplinary steps taken against him/her in accordance with these procedures. Such appeal must be made within seven days of the date of verbal or written warning or dismissal and shall be made in writing to the trustees,

15.9.5. if an employee has a grievance which he or she wishes to raise they should do so in writing to their immediate supervisor. If this is inappropriate (e.g. the grievance is against that supervisor) the grievance should be addressed to the trustees (chair),

15.9.6. the appeal process in respect of the outcome of any grievance procedure is as laid out in the discipline procedure above.

**16. Public Interest Disclosure (Whistleblowing)**

16.1. Employees may disclose information about dishonest, fraudulent and other similar misdemeanours where it is in the public interest to do so. Trustees should be informed in the first place.

16.2. Employees must follow the Policy 26 Whistleblowing

**17. Working from home**

17.1. There may be occasions where it is necessary to vacate the office for reasons of building unavailability, contagion or local and central government instruction. Working from home may be the only option to maintain the Association's services. The Association will enter into consultation over such arrangements.

**18. Equal Opportunities**

18.1. The South Atlantic Medal Association 1982 and its trustees are committed to providing equal opportunities in employment. All job applicants and existing employees will receive equal treatment regardless of age, sex, religion, marital status, sexual orientation, race, colour, nationality, ethnic or national origin, or disability.

18.2. Employees are reminded that it is unlawful to unjustifiably discriminate against individuals either directly or indirectly. The Equality Act 2010 is the relevant legislation and this replaced the Race Relations Act 1975, The Sex Discrimination Act 1975 and the Disability Discrimination Act 1995.

18.3. The trustees will treat seriously, and take action, when any employee has a grievance as a result of discrimination or harassment on sexual or racial grounds or on grounds of disability.

18.4. With regard to disability in the workplace, The Association has a requirement to make any fair and reasonable adjustments to employees work area or situation where merited. EG: access to a BSL interpreter for the hard of hearing, a reader for the visually impaired or specialist equipment or alteration to existing equipment. This can be facilitated by the Government's Access to Work Scheme.

**19. Data Protection**

19.1. Personal details of employees, other than financial matters relating to the payment of wages and PAYE, are kept by the association secretary and trustees in paper form only.

19.2. Personal details stored on computer are those kept by the treasurer sufficient to enable payments in respect of employees to Her Majesty's Revenue and Customs for PAYE. The data protection act provides that any member of staff is entitled to see a copy of their personal

records that are kept on computer or in paper files. The request shall be made to the trustees to view such records.

19.3. In respect of the details held of members of the Association, employees will comply with the provisions of the data protection act and the data protection policy document held in the registered office.

**20. Working Practice and Procedures**

20.1. The working office requires certain standards to be kept and rules to be followed.

20.2. The following are guidelines only and the list is by no means exhaustive:

20.2.1. employees are expected to be polite and courteous with each other and beneficiaries, members, guests and the public,

20.2.2. employees are expected to be punctual and to conduct themselves in a responsible manner,

20.2.3. employees are directly accountable to the trustees who will direct them as to their duties. In respect of the administrative assistant the duties will be as directed by the association secretary,

20.2.4. employees engaged on duties for the Association, which requires them to use their own vehicles, shall ensure that the relevant insurance documentation is in place, that their vehicle complies with the law and is driven in compliance with the highway code. See Annex D,

20.2.5. employees shall not engage in any activity that would bring the Association into disrepute.

**21. Training and Qualifications**

21.1. Training will be given where appropriate to enable employees to discharge the duties for which they are employed. Such training will be provided in the workplace. Where this is not possible, employees will be provided with training by outside agencies. All relevant costs will be met by the Association.

**22. Health, Safety, Environment and Security**

22.1. The trustees have overall and collective responsibility for health, safety and the environment with respect to the office. Trustees shall delegate to a named trustee the strategic duties associated with achieving compliance with respect to the business of the office.

22.2. The employee accountable for carrying out the health, safety, environmental and security duties for the office is the association secretary.

22.3. Employees should refer to the relevant health and safety legislation and Association documentation held at the Association office and should ensure compliance. The trustees shall ensure that all equipment and materials used within the employment comply with such legislation.

22.4. In the event of a fire within the building, employees shall raise the alarm, identify the nearest safe exit, close doors and windows where safe to do so and without any further delay exit the building.

22.5. Employees shall only use fire extinguishers to fight a fire where it is small and offers no immediate threat to life.

22.6. They should not re-enter the building until told to do so by the fire officer-in-charge. Fire equipment is currently supplied and serviced by the landlords.

22.7. Employees must ensure that on leaving the office at the end of the working day they do so by the front door. Before leaving they must ensure that all appropriate electrical equipment is turned off and, if possible, disconnected from the mains supply. All windows and doors are to be made secure. Any alarm must be set before leaving.

22.8. Employees should remain mindful of security and unauthorised access. No personal items of value and money should be left unattended. The trustees shall not be held accountable for any personal loss.

**23. Accidents at Work**

23.1. Only minor injuries shall be dealt with within the office by a suitably qualified first-aid person. Professional medical support shall be obtained in all other cases.

23.2. Where injuries are significant, the emergency arrangements should be put in place.

23.3. A first aid kit is held in the office on the filing cabinet. The contents shall be routinely inspected, shortages replenished and the date and time of the inspection recorded.

23.4. In case of any accident at work, a record must be kept in the book provided and the trustees must be informed in writing.

**ANNEX A**

1. Calculation of Holiday Entitlement
   1.1. Calculating the holiday entitlement of a full-time worker is easy. The statutory minimum number of days is 28 and this number includes the 8 Bank Holidays. Full time workers work a normal week of around 37.5 hours per week within the UK. For holiday calculation purposes the Association has taken a 37.5 hour week as standard which when divided by 5 gives a 7.5 hour working day. Any other arrangement with a new or existing employee will involve a calculation of their holiday entitlement on the basis of weekly hours contracted for, divided by 37.5. Their holiday entitlement is calculated as a per-unit of the full time rate.
   1.2. So the number of day's entitlement is: y x n/37.5= A to give the number of days leave entitlement, where y is the full time days entitlement and n is the number of weekly hours contracted to work.
   1.3. The total hours as calculated are A x 7.5.
   1.4. Number of days of leave entitlement = 28 x 18/37.5 = 13.44 days
   1.5. The number of hours of entitlement will therefore be 13.44 x 7.5 = 100.8 hours.
2. Each employee will have a personal holiday allowance based on years served.
3. Bank Holidays
   3.1. Taking public/bank holidays for full time employees is easy too. They simply take the day off. For those doing part time during a part week is more difficult to achieve and ensure equal benefit for all employees. Some may work during a popular day for public holidays and others rarely.
   3.2. The hours method enables employees to take their leave in whatever proportions or times of their choosing and for it to be easily accounted for and it is fair.
4. Part of Year Qualification
   4.1. Employees may qualify for part of the year at say 28 days per year and another part of the year at 29 days per year. The two rates are worked into a single rate in proportion of the per-unit of the year at each rate.
5. Annual Review
   5.1. The annual entitlement is re-calculated each year based on the years served.

**ANNEX B**

1. Statutory Bank Holidays
   1.1 New Year's Day
   1.2 Good Friday
   1.3 Easter Monday
   1.4 Early May Bank Holiday
   1.5 Spring Bank Holiday
   1.6 Summer Bank Holiday
   1.7 Christmas Day
   1.8 Boxing Day

**ANNEX C**

2. Statutory Sick Pay
   2.1 This payment made by employers, for those who are sick for over four days, may last for 28 weeks with the current weekly rate. Employees must keep the employer informed on their sickness in a prompt way. This arrangement is in addition to the full pay for the first 31 days of an illness in any one year provided by the Association. Statutory sick pay is funded by the employer. There are qualifying conditions including a minimum normal weekly income from the association.

**ANNEX D**

3. Vehicle Insurance for Business Purpose
   3.1 Where personal vehicles are used for business purposes employees are to ensure that insurance is in place that is valid for this business purpose. There is usually no cost for this extra level of insurance where the business is charitable.