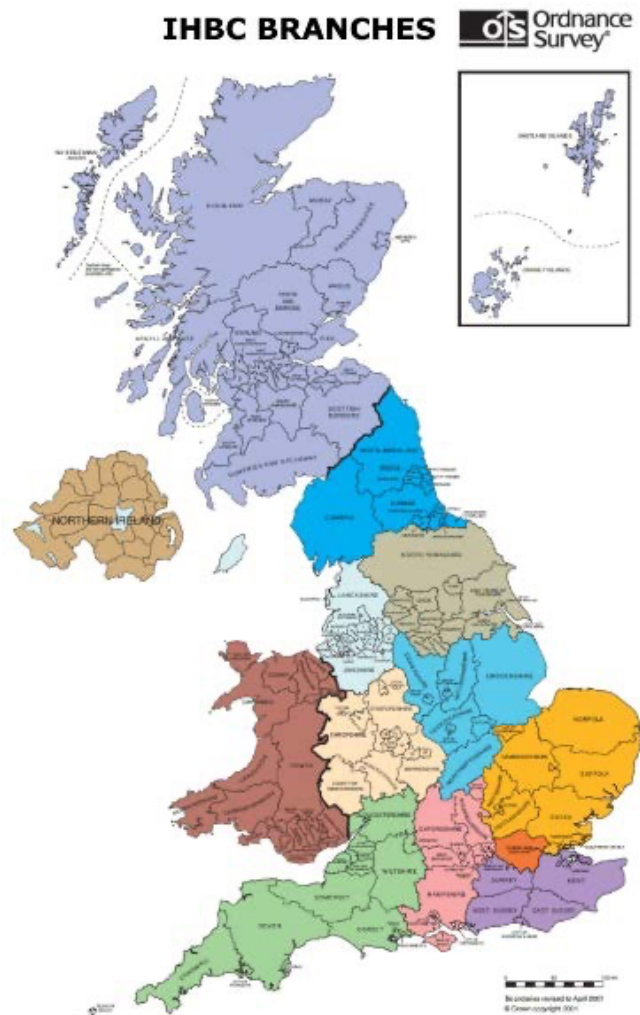


IHBC BRANCH OPERATIONS & ACTIVITIES

Maintaining the IHBC Brand & Standard

Operational Protocols and Guidance for IHBC Branches



IHBC Enterprises Ltd



1. Background

Observing this guidance helps IHBC Branches, including all their volunteers ensure that their operations and activities remain consistent with the professional standards of our institute and its membership.¹

Such standards cannot be relayed in all detail for all situations, but they must align with our agreed positions including especially our:

- [Code of Conduct](#) - for individual professional standards, which give context to why members must act appropriately, such as by declaring interests and respecting colleagues and others.
- [ToolBox](#) - for professional practice standards including:
 - o Our Joint '[Conservation Professional Practice Principles](#)' (2017)
 - o Recognised standards across policy and practice, such as those established in our Research and Guidance Notes, our consultations responses, and our other online resources.



IHBC Quickguide 1: Branch resources and links

- [The IHBC](#)
- [Branches](#)
- [Guidance](#)
- [Branch Officers – 'roles and duties'](#) (link to revised document)
- [Data Protection](#)

¹ Contravention of professional standards in IHBC voluntary operations opens a member to disciplinary action while also damaging the reputation and standing of IHBC directly:
<http://ihbc.org.uk/join/page33/index.html>

2. Branch roles: Maintaining standards across the IHBC

IHBC Branches, and the volunteers that make them such a success, have a central role in supporting local, regional and national CPD events and networking across the IHBC's membership and their wider networks.

In carrying out their role, Branches typically manage funds, plan operations, generate partnerships and develop new initiatives. However, as Branches work within the remit and under the responsibility of the national UK charity and company, appropriate oversight is critical. That oversight is the responsibility, ultimately, of the IHBC's national Board, of trustees and directors.

The IHBC's Board carries out its oversight primarily through the review, scrutiny and, as appropriate, approval of annual Branch Business Plans. In this work it is supported by four lead national committees each leading on a part of the institute's external operations: membership, education, policy and communications.

Board approval of a Branch Business Plan authorises the release of the annual funding allocation identified in the IHBC's annual budget for the year. Any additional funds should be the subject of separate applications.

The submission of Business Plans should happen for approval **before** the financial year to which it applies, that is the June or September meetings. However different branches operate to different timings, and there is no restriction imposed. For further details and guidance on submitting Business Plans see links from [IHBC Branch Guidance](#).

3. General principles: Event management and Branch Business Plans

An IHBC Branch serves as the local, accessible forum for the exchange of ideas, information and experience for members. It also encourages co-operation and understanding across members, colleagues and other interested partners. Typically, any Branch holds meetings, CPD training events and activities, and social functions, and often they will engage in social media activities and publish bulletins and newsletters.

Branches, like the National Office and Committees, often work in partnership with other organisations in their areas. Both Branch and National Office should be proactive in ensuring that any lead events avoid conflicts in date, content and/or audience. Populating, checking and advertising our events calendar should help in such planning.



The annual Branch Business Plan outlines the operations of a Branch for the year and is both the first place to promote any Branch operation and the focus for oversight by national committees and trustees, as discussed below. As such, the Business Plan serves as the basis for maintaining IHBC standards across all our operations, including Branch events and services.

IHBC Quickguide 2: Event funding and business planning

- Promote planned events nationally using your Business Plan and use the [national events calendar](#) to advertise them.
- Your annual Branch Business Plan secures allocated funding by outlining planned events and operations supported by a budget.
- Board approval secures ONLY your annual allocation, so if a Branch seeks more, it MUST do a separate application.
- Including simple income and expenditure projections in a Plan will speed up approval to secure funds.
- Any surplus earned by a Branch, stays in a Branch, though it remains part of the UK charity's assets, for which trustees retain final responsibility.
- If, exceptionally, you need more funds, be sure to discuss this with the National Office and treasurer in the first instance.
- Guidance on Branch Business Plans is available via links from [IHBC Branch Guidance](#)
- Include the correct registered address and company and charity registration on all documents, flyers etc.

All documents produced on behalf of IHBC MUST include the registered address and company and charity registration details. This includes letter, flyers, event programmes and agendas. The correct details are:

Registered & Business Office: Jubilee House, High Street, Tisbury, Wiltshire SP3 6HA
IHBC Registered as a charity in England, No. 1061593, & in Scotland, No. SC041945
Company limited by guarantee, Registered in England, No.3333780

4. National oversight and standards

The IHBC always welcomes any Branch plans and proposals, especially new initiatives, but these must always be tied to wider IHBC plans, principles or controls to make sure that standards can be maintained and overseen.

For any new initiative, a simple rule of thumb to evaluate the need for determining such oversight is that it must be identified in a Branch Business Plan, if time allows, and, in any case, it should be authorised by the relevant national committee. If there is not sufficient guidance available for any particular initiative, volunteers should always liaise with an appropriate and more senior authority or adviser in the institute, such as the National Office, trustees, or committees.

Without prior authorisation, Branches should not become engaged in issues that might impact on the position of the UK organisation. Such actions may lead others to believe they are acting on behalf of the IHBC as a whole, when that is not the case. The IHBC's arrangements with national Branches – in Northern Ireland, Scotland, and Wales – reflect delegated heritage management arrangements with the UK, so they have standing authority for direct engagement with their own national governments, agencies and organisations.

Areas of operation typically regarded as requiring formal consideration or input by national officers and committees include:

- *Advocacy in policy matters*, as it may impact on the IHBC's advocacy and practice standards, such as consultations.
- *Events that are not strictly CPD or networking*, which may impact on the IHBC's learning and accreditation standards and activities, such as training related to membership applications (e.g. Membership Application Training Event (MATE) sessions).
- *Publications relating to practice standards*, as the IHBC 'branding' – such as using logos in publications – can suggest undue authorisation.

If in doubt, a precautionary strategy ALWAYS MUST be adopted, and enquiries made. Especially in a thinly-spread, voluntary organisation such as the IHBC, volunteers must check things out more rather than less. Any need for further authorisation can be explored easily and quickly, typically in consultation with the National Office so that information requirements can be addressed and, as needed, matters addressed efficiently through IHBC's staff.



IHBC Quickguide 3: Branch standards

- Operations generally regarded as requiring special consideration include:
 - Advocacy in policy matters
 - Events that are not strictly CPD or networking
 - Publications relating to practice standards
- Remembering that, you should adopt a precautionary strategy, if you are unsure on any matter, general queries may be directed first to services@ihbc.org.uk
- Data protection is a high priority for the IHBC. While we maintain strong control on personal and sensitive data centrally we know that members need to use personal contacts to promote our work locally. We encourage a sensitive and proportionate approach to personal data such as contact details, and volunteers are advised to observe standards noted at ihbc.org.uk.

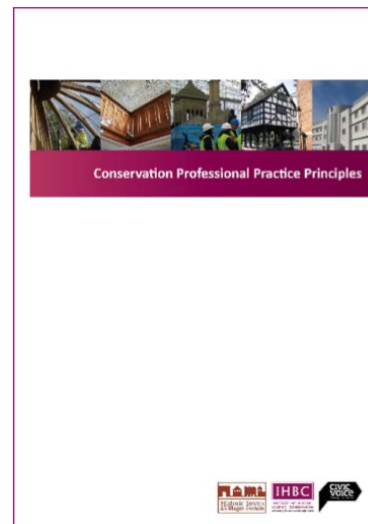
5. Communications and branding

Branches are encouraged to promote local press profiling and communications that support heritage, and to take part in social media activities. However, such promotion always should be:

- Consistent with the IHBC's national policy statements, standards and guidelines, as outlined above and elsewhere
- Exclude reference to specific cases or casework, unless prior approval or clear protocols are in place.

Typically, a general focus on key messages is especially welcome, and includes:

- Raising awareness of the good and charitable work of the IHBC and its members (declaring interests as appropriate). You can keep up to date easily by checking our [Newsblogs](#)
- Highlighting the importance of good practice standards, including inter-disciplinary practice
- You can check issues using the links in the [ToolBox](#), or by asking officers or the National Office
- Applauding 'good news' for the sector, including especially outcomes that reflect values detailed in our joint '[Conservation Professional Practice Principles](#)'



6. Communications with members

Change of details: When a Branch member changes home or work details, refer them to Carmen Moran, IHBC Membership Services & Events at membershipservices@ihbc.org.uk

GDPR: Data protection is a high priority for the IHBC. While we maintain strong control on personal and sensitive data centrally we know that members need to use personal contacts to promote our work locally. We encourage a sensitive and proportionate approach to personal data such as contact details, and volunteers are advised to observe standards noted at ihbc.org.uk

The professional details you provide are retained to help us determine the effectiveness of our training, in line with our charitable objectives and our guidance. If you do not want your personal contact details to be used to inform our work please let us know by written reply.

Branch Logo: Unless agreed or noted otherwise by a relevant part of the national organisation, the Branch logo with the Branch name on it should be used on publications and promotions by the Branch. The use of the main IHBC logo should be reserved for authorised national IHBC events and publications.

Anything not covered in these guidelines, or not clear, should be referred to the national committee or office.

IHBC Quickguide 4: Branch communications

- Key messages include
 - o Raise awareness of the IHBC – check the [Newsblogs](#)
 - o Highlight good practice standards - check the [ToolBox](#)
 - o Applaud 'good news' - reflect our joint 'Conservation Professional Practice Principles'
- A Branch press support pack is at [ZIP archive - update](#)
- Social media activities are encouraged but caution is advised
- Queries should be referred to services@ihbc.org.uk
- Data protection is a high priority for the IHBC. While we maintain strong control on personal and sensitive data centrally we know that members need to use personal contacts to promote our work locally. We encourage a sensitive and proportionate approach to personal data such as contact details, and volunteers are advised to observe standards noted at ihbc.org.uk.

Date August 2021

Version

Author IHBC National Office