

Independent Age

Assessing Volunteers Training



Pre-course:

- **Case studies**
- **Links to our videos**

Suggested exercise depending on group sizes:

- **Ask participants for their name and a non-intrusive question (eg, ask your neighbour one thing they would like to share about themselves with the group?)**
- **Ask them about what their expectations of the day and if they see any concerns in this role.** Make a note of them and you can revisit them at the end of the session to check if everything has been covered.

Follow up by establishing the ground rules for the session: phones off, respect, one talking at a time, if possible wait to ask questions to the allocated time of the exercise, ...

Aims and learning outcomes

At the end of this session you will be able to:

- Talk about common issues affecting older people
- Understand your role as an Assessing Volunteer
- The issues that arise in volunteering
- Be confident with Recording and Reporting



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We acknowledge that some of you will have extensive experience in other organisations in similar roles but this training is about how it applies to Independent Age: to have a clear understanding of your role and feel confident to perform it following Independent Age policies and procedures.

The training is interactive, so it would be great if you could share your experience and ideas during the session so we can all learn from one another. We'll cover:

Older people's issues, the work Independent Age does, why we need Assessing Volunteers to help address those issues and the people we support

The Assessing Volunteer (AV) role, including:

- The role: Tasks and duties
- The volunteer visitor role
- Issues that might arise when supporting older people: safeguarding, lone working, data protection and boundaries
- The support for the AV and how to keep in touch with the WPO

Recording and reporting: the forms to use/frequency of use

- Monthly reports
- Confidentiality and data protection form

- Diary sheets and expenses forms
- Monthly reports

Older people's issues

Loneliness

Money

Support and care

Health

Housing

Working later in life



In order to help you begin to understand the potential needs of the older people we support,

Question: What are some of the issues that affect older people in our society?

The slide lists the main issues that our research has shown affect older people in our society. Independent Age provides free information and advice on those topics for older people and their carers. We also try to alleviate loneliness and isolation through our friendship services.

You don't need to go through the whole list, just reinforce one or two. All references at the end of the presentation.

Loneliness:

2 million people aged 75 and over live alone in the UK. Ref. 1

Money:

£3.7 billion of benefits go unclaimed by older people each year. Ref. 9

Support and care:

1.3 million carers are aged 65 and over in England and Wales. Ref.5

Health:

Dementia could affect up to 1 million people by 2030 (currently around 850,000 affected). Ref.10

Working later in life:

Since 5 October 2012, the law changed 'the default retirement age'. The State pension age rise to **65 for women** between 2010 and 2018, and then to 66, 67 and **68** for both men and women.

Scottish Data

In the UK there are 4.8 million people aged 75 and over, of whom 0.4 million live in Scotland. Ref.1

100,000 older people in Scotland are lonely most or all of the time. Ref.2

There are around 759,000 adults, providing care to one or more people, almost 95,000 of them are aged 65 or older. Ref.3

15% of pensioners in Scotland were living in relative poverty in 2013-2014. Ref.4

In 2014/15, 15% of pensioners in Scotland were living in relative poverty before housing costs, compared with 16% across the UK. Ref.5

How we describe people

Older people

Older age

Older people we support

... we call

... we visit

... who call our helpline



We conducted some research (in late 2015) about how we should talk about and describe our services and information resources. We carried out a consultation which gave us invaluable information on what older people expect of us and how we describe ourselves so people understand who we are and what we do.

We use a non-patronising, warm and friendly tone, using Plain English (we won a Plain English Award in 2016 for our communication style, beating other leading charities and another one in 2017 for our 'Coping with bereavement' and 'Scamwise' guides. We were rewarded for clarity, accessibility and commitment to clear, useful information.

Internally staff uses the term "service users" for those older people who are supported by our volunteers.

You will find the Verbal identity presentation in your toolkit, which includes a list of preferred terms that you should use in your role as a coordinating volunteer.

(If asked, you can talk about how the consultation took place: For the research into our verbal identity, IA consulted 2,000 members of the public all aged 55 and above. People who are 55 are often family members of older people and 17% of those consulted were over 75.)

How we describe ourselves

Whatever happens as we get older, we all want to remain independent and live life on our own terms. That's why, as well as offering **regular friendly contact** and a strong campaigning voice, Independent Age can provide you and **your family** with clear, free and **impartial** advice on the issues that matter: **care and support**, money and benefits, health and mobility. A **charity** founded over **150 years** ago, we're independent so you can be.



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We have ways of describing the work we do. This is Independent Age's "boilerplate", a paragraph that is a standard way of saying what we do in a way that the key messages of the organisation can be easily understood and transmitted.

Through our research we found that:

- 'Independence' is a fantastic differentiator for us and the work we do
- People prefer not to be labelled and are sensitive around labels associated with age, hence why we talk about "older people"
- Freedom and independence are of most importance to people, while dependency on others is considered negative
- We should be using really descriptive language to describe what we do, making it clear in the names what those services are (friendship, campaigning and advice)

A key part of the role of a AV is to represent Independent Age when assessing older people, following our values and principles.

Handout 1: Verbal Identity

The people we support



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These are some examples of the people we support. As you can see, there is no one particular type of person:

Tony is 83 years old and married. He would like to have more people to talk to as his wife is deaf and would like to have more "male conversation". He has two daughters, who he sees them when he can. They work a lot of the time so he doesn't see them often. Also, his brother passed away in June of last year and they were very close. His health is overall fine but sometimes he walks with a stick.

Sandra is 74 years old. She has been working at local college for many years. Her husband of 28 years died in December 2016 and she is still struggling with this. Recently she is also suffering from low mood as her daughter and family have relocated to a different town. She feels she really needs a friend 'at this moment in time'.

Marie is 88. She lives on her own and has mobility issues since an operation last year. She uses a walking stick and goes out everyday to her local shop to buy the paper. Her only daughter lives in Greece and they only see each other a few times a year (although they speak on the phone every week). She would like to have more contact. She usually feels lonely, especially on weekends.

Volunteer Visitors



Independent Age offers Volunteer Visitors who regularly visit an older person. The aim of our Volunteer visitors roles is to:

- increase self confidence
- encourage independence
- decrease loneliness
- improve quality of life

Volunteers empower the older people they support by encouraging them to help themselves rather than to become dependent on the volunteer's help. This empowerment is what underpins Independent Age Mission: "*Independent Age helps older people across the UK to live well with dignity, choice and control.*"

Key Responsibilities

- To agree with the older person, and deliver, a regular routine of calls/ visits to establish an enjoyable and supportive relationship
- To deal appropriately with confidential and sensitive material
- To report any concerns to their Independent Age contact in line with Independent Age's safeguarding procedures

You will assess the suitability of the older person for receiving the services Independent Age provides for face to face friendship services.

Handout 2: VV role and Boundaries

The assessing volunteer role



We are now going to look more in detail at the role of the Assessing Volunteer, including what your role is (tasks and duties), how the assessment process works in practice, processes and practical considerations (safeguarding, lone working, data protection and boundaries) and finally the support that is available to you.

The main **reason** we need Assessing Volunteers is to support the WPO so that we can support and reach more (lonely) older people in need of our services.

Question: What are the attributes a good volunteer assessor should have?

Suggested answers: Assessors of older people need the following attributes:

- *good communication skills*
- *ability to facilitate the older person's communication of their situation/ needs*
- *good interpersonal skills*
- *sensitivity to the older person's beliefs and attitudes*
- *awareness of spiritual aspects of the person's capabilities*

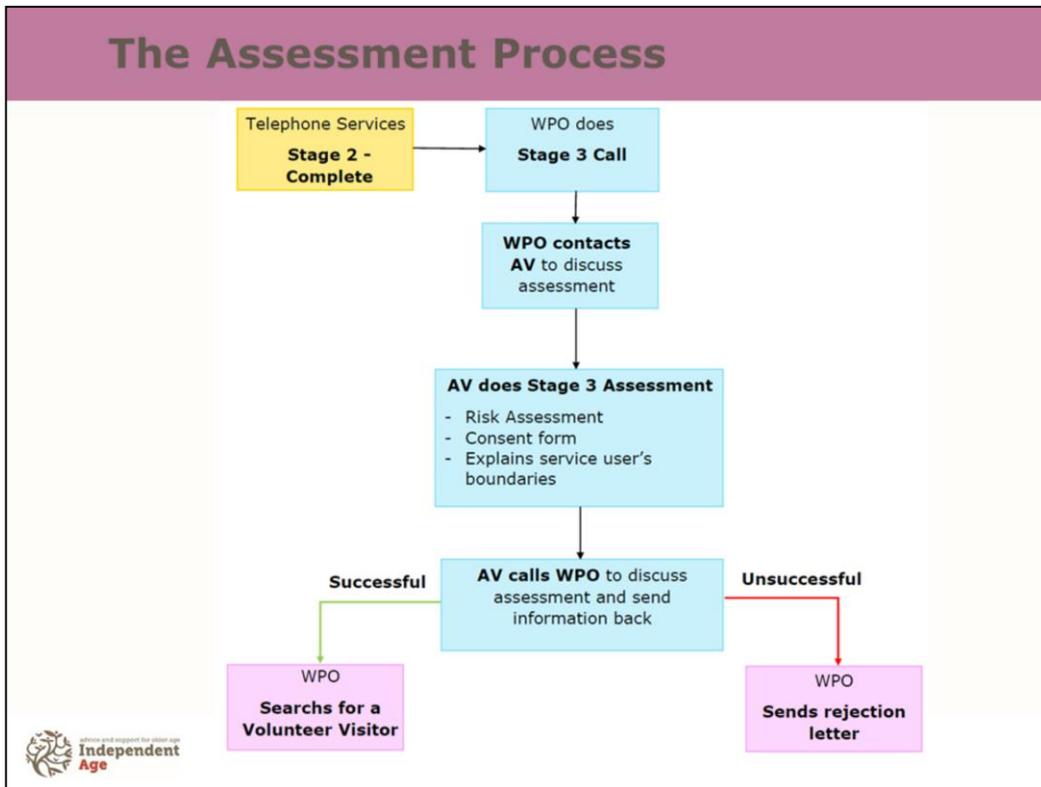
Question:

- Which areas of your role are you most interested in? What attracted you to the role?

- Are there any areas you are not comfortable with or you need more support in: Let's talk about them!

Explain: The focus of the role is on the older people, but the processes have to happen so we can be consistent and fair, demonstrate impact and pick up on any issues quickly.

We are now going to spend some time looking one by one to the tasks that you will have to do as part of your role.



Handout 2: The assessment process procedure for AVs

Question: What is the reason behind doing assessments?

Answers might include:

- *Making sure our services are appropriate to their needs*
- *Protecting service users*
- *Having information on their needs*
- *Start of a successful relationships ensure they approach the organisation with a clear knowledge of what we can offer them*

The process we currently have for assessments comprises:

An initial (stage 2) assessment over the phone with the older person that covers:

What they would like to get out of the Friendship Service
Health and other issues

Loneliness scale questionnaire

A Risk assessment, covering health, accommodation, ...

The referral is sent to the WPO, who will contact the older person (using the Stage 3 call form)

Once they do this call, WPO contacts to discuss the assessment

with the AV and agree an assessment visit in the next 10 days

If the AV is free, they contact the older person to agree a visit to complete the rest of the assessment (stage 3 assessment, risk assessment and consent form)

Once the assessment is done, the AV will call the WPO to discuss the assessment and post/ email all paperwork within the agreed timescales

The WPO now updates our database ThankQ and matches the older person with a volunteer or stops the referral (eg, we can't meet their expectations/ needs so we will signpost them to another organisation that might be better suited for them or the environment is not suitable for a VV in which case we will offer a TV instead).

Assessing older people



You will assess the suitability of the older person for receiving the services Independent Age provides for face to face friendship services. Older people accessing friendship services through Independent Age are lonely and are matched with a Volunteer Visitor who will have regular contact with them for a chat. Giving time to listen to an older person can empower them, improve their physical and mental wellbeing and build self-esteem.

You will also be involved in revisiting the situation of older people who are currently receiving visits from a volunteer visitor.

Older people assessments should be informal, and might take the form of a discussion or chat at the same time making sure we get the information we need to gather. This interview assessment will give us the chance to make sure we are able to provide the service best suited to that person's needs. Remember: it is not an interrogation!

Communicating with older people

- Invest time in the beginning
- Stress who you are and what your job is
- Use short sentences and Plain English
- Let them tell you in their own words
- Be mindful of distractions
- Use eye contact
- Be mindful of your own body language and tone
- Pay attention to non-verbal cues



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Good communication is at the heart of assessment: listening carefully and understanding what is said, what is felt and what is helpful are essential skills for an assessor, as is the ability to explain clearly what you are doing and why.

Exercise: Think of how will you approach a conversation with an older person you are going to assess. How will you start? What communication skills/ cues **will you use?**

Debrief: At the assessment the older person will be dealing with a completely unknown person, who may not expect to have long or regular contact with them. Good communication skills are particularly important in these situations, and especially when the older person may be anxious, inhibited, depressed or confused, or have impaired memory or speech.

Some practical considerations when in your meeting are:

- Invest time in the beginning: it's all about building up a relationship. You may get some suspicion, and some people are very vulnerable.
- Stress who you are and what your job is
- Use short sentences and Plain English
- Don't finish sentences; don't provide words; don't rephrase your

question when they're struggling to answer. Let them tell you in their own words

- Be mindful of distractions, eg. cars passing, clocks chiming, all of them can completely distract the person. Physical and eye contact can help, especially when something is distracting.
- Pay attention to non-verbal cues. You'll get the meaning from tone, expression, and mood as well as from words
- Dementia, depression or any other form of mental illness may affect an individual's capacity to communicate, but the older person will still have opinions, preferences, and the capacity for feelings and emotions.

The Stage 3 assessment form

Stage 3 - Monitoring	
About the Individual/ additional Information:	
1. A typical day - their routine	
2. More information about hobbies, activities, appointments, visits	
3. Their past, jobs etc.?	
4. Friends/relationships etc.	
5. Availability for visits – Evenings? Weekends? Best time to visit?	

The Loneliness Scale	
1. I am content with my friendships and relationships	
Strongly disagree (4) Disagree (3) Neutral (2) Agree (1) Strongly agree (0)	0
2. I have enough people I feel comfortable asking for help at any time	
Strongly disagree (4) Disagree (3) Neutral (2) Agree (1) Strongly agree (0)	0
3. My relationships are as satisfying as I would want them to be	
Strongly disagree (4) Disagree (3) Neutral (2) Agree (1) Strongly agree (0)	0
Total Score	

The Wellbeing Scale	
1. I've been feeling optimistic about the future	
None of the time (1) Rarely (2) Some of The Time (3) Often (4) All of the Time (5)	0



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Hand-out 4, 5 and 6: Stage 3 Assessment form, Service Users boundaries, Risk Assessment and Vulnerability management plan

The assessment form covers:

- About the Individual/ additional Information
- Loneliness scales
- Consent form
- Service users boundaries discussion

After the assessment, you will update the Risk Assessment & Vulnerability Management plan with other relevant information on the property, area and person.

We have guidelines and you will shadow a WPO in your first assessment.

Go through the forms with volunteers, sharing the guidelines and clarifying how to best approach asking the scales questions (eg, for ease and clarity they can use the psychological scales cheat form so older people can point the answer to the question).

We collect information to evaluate the impact that the volunteer visitor is having on the wellbeing of the older

person. Measuring this impact is really useful as we can evidence the need for this type of intervention, especially important when demonstrating the value of our service and when applying for external funding.

Because of those reasons, when the AV is doing the assessment, they should encourage the older person to answer all questions, but do not press them for answers. It is ok if they refuse to answer some of them. You might struggle to ask some questions at the beginning, that is normal. Coming across as confident will help you to get an answer from the older person.

It is really important that you also discuss the service user boundaries with them, so they know what the volunteer will be able to do with them. And not forget to make sure the older person signs the consent form of the assessment.

When completing the forms, avoid using personal identifiable information as much as possible, eg. use initials only.

Both, initial assessments and re-assessments of existing service users take the same form.

Risk assessments

Scoring		Level of Risk - Actions
1-5	Low	Control Measures to be Monitored
6-9	Medium	Control Measures Require Improving so far as is Reasonably Practicable
10+	High	Immediate Action Required to Reduce the Level Risk or Cease Task

Main risks associated to this service user and management plan:	Score	Degree of risk:
<i>E.g. Mental health: schizophrenia. Managed by medication, regular contact with GP. Always call on the day to ensure they feel well for the visit.</i>		Low (2)

If you are concerned about the older person, you can contact...

During office hours Monday to Friday 9am to 5pm

- Independent Age Contact:
- Independent Age Helpline:

Outside of office hours:

- Social Services:
- Independent Age Out of Hours Safeguarding:



Handout 7: Stage 3 assessment form with ANSWERS

Exercise: following on the case study on Marie and the new information given on the Stage 3 risk assessment, try to update it.

Debrief: The Risk Assessment & Vulnerability Management Plan is to be completed for each service user and volunteering situation. This form is in place to mitigate identified risks, to ensure the safety of both Independent Age staff and volunteers. It is vital that it is completed thoroughly and for it to be accessible to anyone representing Independent Age entering the accommodation of the older person.

Firstly the IA staff member creates a Risk Assessment and Management Plan, ascertaining if there are any red flag issues (eg., potentially aggressive behaviour, external people within or visiting the property, substance and alcohol use and difficult internal or external environment).

After the assessment, once the AV leaves the property they should complete the risk assessment form with any further risks identified adding the risk score and mitigating actions to minimise the risks. If the Degree of Risk score cannot be lowered below 10

(which indicates a high risk) then a decision will need to be made about whether a match can take place.

The WPO and the Assessing Volunteer both sign the assessment to confirm they have read, contributed to and understood it.

After the AV has finished completing the assessment and risk assessment, they should call the WPO to discuss it and agree next steps (eg, sending the forms electronically/ on the post,...)

What the assessment is/ is not

- An opportunity to know them a bit better
- A chance to know if our services are appropriate for them... and viceversa
- Building rapport and reassurance
- Raising safeguarding alerts
- Not an interrogation
- Not intrusive questions
- No filling in forms or referrals
- A decision making process just for you
- No signposting to other agencies

Overall, the assessment process should be an enjoyable process in which you get to know a bit better the older person and make sure they are aware of what our services can offer, to avoid a later disappointment.

It is not a situation in which you are evaluating and making a decision on the suitability of the person just by yourself. Your WPO is there to support you, discussing the assessment before/ after the meeting and agree a mutually satisfactory decision.

Practical checklist

Before the assessment:

- Read Stage 2 assessment and clarify it with WPO, including any red flags
- Think about what more information you want to gather
- Familiarise yourself with the forms
- Agree date and time
- Look at transport, travel times and parking
- Follow lone working guidelines
- Call to re-confirm the assessment in the morning

At the assessment:

- Tell your Trusted Contact where you are going
- Put your phone on silent, so you don't get distracted
- Have paperwork ready
- Be organised and punctual
- Ensure the older person understands you
- Be aware of the time
- Be aware of any safeguarding issues and report to WPO
- Let your Trusted Contact know you have finished

These are some practical notes on how to prepare for an assessment.

Filling in, sending and storing information

- Use non-identifiable pseudo-anonymised information
- Through an Independent Age secure online connection
- Over the post- TBC



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Your Independent Age contact will email you the names of the people who need to be assessed. They will send you this information safely by using your Independent Age email address.

You will contact them to agree a day/ time and inform your Independent Age contact that you have booked the assessment.

The process for AVs to safely process information when conducting assessments is:

Before assessment visit:

You can download and print the Stage 3 assessment form, including risk assessment and consent form and pre-stamped envelope (which was given to you at training/ first meeting by your Independent Age contact

or

Your Independent Age contact posts all materials to you (including a Stage 3 assessment form, risk assessment, consent form and pre-stamped envelope)

At assessment visit:

You can make unidentifiable/ pseudo-anonymised notes on the

paper forms,

You complete the consent agreement with the older person, ensuring they sign it.

After the assessment visit:

Please call your Independent Age contact to discuss the assessment, making sure you are in a quiet place and the conversation is not overheard

Please post back the Agreement form to the Regional National Wellbeing Manager, using the pre-stamped envelope

Using your secured Independent Age connection, you can fill in the forms with all the information on your notes and email them back to WPO, within 3 days

Finally, you can safely store or destroy the notes by:

- Store on a secure lockable cabinet or drawer
- Destroy the notes by shredding all the paperwork using a cross-cut shredder.

What to do if ...

- No one answers the door?
- You have a safeguarding concern?
- There is more people in the house?
- They don't know why you are there?
- You need to signpost them to another agency?



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By now you should feel a little bit more confident about the assessment. Can you think of any situations where you are not clear on the next course of action?

The ones in the slide are most of the common situations that WPO have encountered when doing Assessments.

- **No one answers the door?**

The day before or on the day, call them to confirm the visit

At the door, call them withholding your number (Enter 141 before dialling their number to prevent them seeing your phone number or check your mobile phone provider for other codes) to know whether they are at home or they are running late

If there is no answer at the door or telephone, wait for 10 minutes

Call WPO so they can action on it

- **You have a safeguarding concern?**

Contact the WPO or the safeguarding our of hours number as soon as you can. If it is an emergency, you might want to call emergency services

- **There is more people in the house?**

It depends who is the in the house. It might be their carer who is

just finishing or it might be that they have agreed to have another person with them (a carer or family member) at the assessment.

If you are in a situation where there is unexpected people or you are uncomfortable about it, just make your excuses and leave the property. Your safety and comfort always comes first.

- **They don't know why you are there?**

Always bring an information leaflet and your ID card with you. Explain to them what Independent Age is. If still not sure of who you are or what are you there for, leave the visit and talk to your WPO so they can take it forward.

- **You need to signpost them to another agency?**

If an older person needs support they should be directed to our Helpline on 0800 319 6789 where they can receive support or be directed to one of our approved contacts.

In exceptional circumstance when the older person is not able to call them themselves, tell the WPO immediately so they complete an Advice Line referral form. The advice line will then attempt to call them twice and if no reply they'll leave a message.

Review calls

- One month review
- Service user follow up review
- Touchpoint calls



Emphasise that it is a crucial role, enabling and developing volunteers and listening out for any potential problems. They assess what older people say to check the relationship is going well.

For all review calls, please remember to withhold your number by using the prefix '141' or checking with your phone provider.

1 month review

This review with the older person is a 5 minutes quick call to ensure the friendship relationship is going smoothly.

The WPO will email the AV any calls that they need to be make that month and by when. The AV then calls the older person on scheduled day. If the older person is not available they leave a voicemail and try calling again later.

Fill in the Service User One Month Review form and email/ post it back to your WPO as agreed.

3, 6 month and following reviews

This is the same process as above but completing the follow up review form. It consists of few general questions about the older person as well as the same Monitoring and Evaluation questions that were asked during the initial assessment.

You can use the same Service User follow up review form 3,6, 12.. and email/ post it back to your WPO as agreed.

These forms are a bit long, and not as easy to use on the phone as they are in person. You might find some problems and you might have to repeat some questions to the older person. Any issues you might encounter, always share them with your Independent Age contact.

Touchpoint Calls for not matched Older people

Touchpoint calls are made to those services users who have not been matched with a Volunteer Visitor yet. They are a quick call to ensure they are ok and reinforce we are still looking for a volunteer for them.

Your WPO will tell you who is due for a call that month and you can use the Touchpoint call guide to guide you on the conversation. Once done, complete the guide with any information you have discovered on the call and send them back to your WPO as agreed.

Handouts 8, 9 and 10: Service user one month review form, Service user follow up review form 3,6,12,18, Touchpoint call guide and form

Processes and guidelines



To enable you to carry out your role, we have a well structured process, from recruitment and induction to a volunteer leaving. We will be covering the different policies and forms you need to complete and be aware of in a few moments.

All policies, procedures and forms are included in your Training Toolkit

Lone Working and keeping safe



Emphasis: volunteer's responsibility to follow policies and procedures to protect themselves

All volunteers get in their welcome pack the policies and procedures on safeguarding, lone working, confidentiality and boundaries. These policies help to raise awareness on those issues and to ensure volunteers look after themselves, minimising any risks, especially around lone working within the scope of our charity's activities.

Ask: What is a lone worker? Do you think you are a lone worker?

Answer: A lone worker is someone (volunteer or staff) who regularly or occasionally work on their own without direct supervision/support.

EXERCISE: in your pre-course exercise you already considered some of the risks to bear in mind when visiting an older person. Let's think about:

- What potential risks do you need to think about when you are out on your own visiting an older person?
- What measures can be put in place to minimise those risks you have identified?

Possible answers are:

- *Contact with the general public*
- *Visiting unfamiliar places*

- *Volunteering alone*
- *Volunteering in the evenings/weekends*
- *Different risks: inner city vs rural*
- *Volunteers are in someone else's territory, often in a confined space*
- *There might be other people they don't know in the property*

ASK: How do volunteers protect themselves?

Answers include:

- Reading and understanding the Lone Working Policy and guidance
- Taking personal responsibility for following and adhering to it
- Completing role specific training
- Providing details of **a trusted contact**; a person who has agreed to be the first point of contact and will act responsibly in an emergency situation, usually a partner, family member or friend.
- By reporting any incidents concerning lone working to enable Independent Age to review our policy and procedures.

Trusted contact procedures:

Prior to visits taking place the volunteer should let their trusted contact know:

- The details of the person they are visiting (Name, Address including post code and Phone number)
- If there has been a change in plans
- The volunteer's own mobile phone number
- The contact details of the volunteer's Independent Age contact
- The expected duration of the home visit including planned start and finish times.

Staying safe when out and about:

- Plan your journey carefully
- Charge your phone and save the contact numbers listed below.
- Tell your trusted contact where you are going and when you expect to be back.
- Be aware of any potential risks

Remember: If you are uncomfortable for any reason – leave

And **always report** any incidents or concerns, no matter how small they seem, from yourself or your volunteers, to your Independent Age contact.

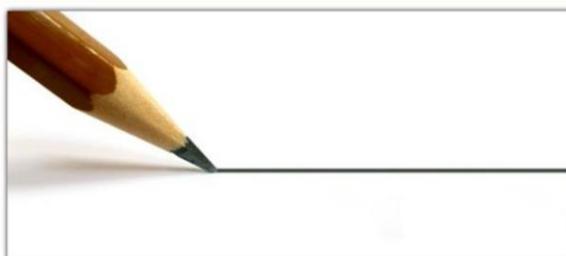
Hand-outs on Lone Working policies, procedures and guidelines are part of your welcome pack and training toolkit. If unsure about the process to follow, please discuss it with your Independent Age contact.

Boundaries of each role

What are boundaries?

Think about your own personal boundaries

Why do we need them in volunteering?



As everyone volunteers on their own, boundaries are critical.

Open discussion with these prompts on the slide.

Answer: Boundaries could be defined as:

Guidelines that people work within

Set parameters of what is and what is not acceptable behaviour

Boundaries take many forms (Physical, Emotional, Financial, Relationships and Communication). Every person's boundaries are different from one another and it is important to recognise this, especially for Friendship Volunteers) and make them aware of the differences that the volunteers' boundaries might have with the older person's boundaries.

These are the volunteering role boundaries we have put in place based on experience of what works well to develop a happy and fulfilling volunteering relationship. The boundaries provide a framework for everyone to understand what is and isn't included in the volunteering role and to protect the volunteer from being asked to do something outside their role. We talk about boundaries in more depth in your training

Besides of the service user boundaries, each volunteering role has their own boundaries.

Hand-out 11: AV boundaries and give them 5 minutes to check if there is anything that at first glance surprises them.

Your role is not to...

- Provide advice outside your role
- Provide health care or personal care
- Solve any problems that might arise
- Offer counselling or therapy
- Promise to keep secrets
- Accept gifts
- Signpost the older person to another agency



QUESTION: Think yourself in your role as a Assessing Volunteer, What are the areas that are outside your remit?

We have other roles that do other tasks such as fundraising/ visiting/ calling an older person. You may want to take on another roles, and be will be delighted, but we need to know who is doing what and give a true reflection of what our volunteers do.

Remember: we have other services to support you such as Information and Advice that older people can access directly by calling our freephone Helpline on 0800 319 6789 . There they can get some information or an appointment to talk to an expert advisor.

Safeguarding



Safeguarding: A Short Guide

Independent Age has Safeguarding Policy and Procedures in place, which aim to protect the older people we support from avoidable harm. These state that all staff and volunteers have a key role to play in preventing harm or abuse from occurring, and in taking action when concerns arise.

What is safeguarding?

Government guidance defines safeguarding as: "Protecting an adult's right to live in safety, free from abuse and neglect." Safeguarding aims to:

- stop abuse and neglect where possible
- prevent harm from happening in the first place, and reduce the risk of neglect to adults.

What is abuse?

Abuse is when someone causes harm or distress to another person. It can:

- Be a single act or repeated acts
- Affect one or more people
- Be carried out by anyone including family members, friends, professionals and strangers.

The different types of abuse are:

Physical abuse	Modern slavery
Domestic violence	Discriminatory abuse
Sexual abuse	Organisational abuse
Psychological abuse	Neglect and acts of omission
Financial or material abuse	Self-neglect



By now all of you are familiar with safeguarding and your responsibilities towards it after completing the online training.

We are just going to reinforce your learning by quickly revisiting safeguarding.

Question: Can anyone remember the definition of what safeguarding is?

Answer: Statutory guidance defines Safeguarding as: "Protecting an adult's rights to live in safety, free from abuse and neglect." The aims of safeguarding are:

To stop abuse and neglect where possible

To prevent harm and reduce the risk of neglect to adults

Question: Can you remember the different types of abuse?

It can be difficult to recognise signs of abuse, but you should pass on any concerns you might have to your Independent Age contact.

The types of abuse are: Physical, Sexual, Psychological (emotional), Financial/material, Domestic violence, Discriminatory, Organisational, Neglect/Acts of Omission, Self-harm

Remember: in your assessments if you are worried about a

possible safeguarding concerns, always discuss them with your WPO or call the Out of Hours number on after 5pm.

Handout 12: quick Safeguarding guide

Confidentiality and Data Protection

Do

- Comply with Independent Age Data Protection guidelines
- Ensure you only share general information about your role with friends and family
- Be aware of your own needs and limits about what you disclose to your volunteers
- Always share any concerns with your Independent Age contact

Don't

- Promise to keep a secret
- Reveal any information about the older person or volunteers or any company information to anyone outside of Independent Age
- Disclose personal information without the person's consent
- Disclose your personal and/ or contact details
- Send personal data by email or copy personal data to any type of removable media



All volunteers get the Data Protection and Confidentiality Guidance as part of their Welcome Pack with the guidelines they should follow whilst volunteering

This slide reinforces some of the steps/ precautions we all should take around confidentiality, specially linked but not only related to safeguarding.

The issues on the slide are generic , but for more in depth guidance refer to those guidelines.

In your role you will be dealing with personal and sensitive information. It is really important that you comply with our Data Protection Policy and guidelines, which include:

- In your home, please keep printed information in a secured lockable drawer or cabinet.
- Please make sure any personal and sensitive information that is taken out of your home is as unidentifiable as possible.
- When doing an assessment please use initials where possible so to make it harder to identify the older person.
- Please do not copy/ store information on to another medium, like an external hard disk or a USB key.
- If you need to store contact details of the person you are visiting on your phone, it should be in a way that the minimum amount of

detail is stored e.g. initials and just the first line of the address only. No identifiable sensitive information should be stored on the phone at any time. The phone should be locked with a secure code at all times.

- Please do not discuss personal or sensitive information with professionals, family or friends and always ensure any conversations about the person you support are not overheard.
- Any concerns about the older person should be shared with your Independent Age contact only.
- Please do not email details of the older person you support to any other person or organisation, except where approved by your Independent Age contact.
- Always use your secure Independent Age email address to send personal or sensitive information to an Independent Age staff member,

Support for Assessing Volunteers



Induction and Training

- As part of your role, you have already participated on online safeguarding and data protection training
- Besides this role specific training, during your induction you will also go through the Volunteer Visitor role so you can have a good understanding of what they do.
- We are planning more training in topics that are relevant to your role and to the issues faced by the older people, such as dementia or mental health.

Support from WPO

Your IA contact is there to support you in your role and make sure you enjoy it. They will keep in touch with you regularly but it is important that you also keep in touch with them:

- At least on a monthly basis, so you can tell them what you have been doing that month
- At one month, 3 month and 6 months after that for catch up sessions
- Any time there is a concern, it doesn't matter how small it is, just call them or send them an email
- You can also expect support from their manager, the National Wellbeing Manager

Support from other teams: Volunteering and Information and Advice

The Helpline

We have expert advisers who give advice over the phone on issues such as getting help at home, adaptations, care assessments, paying for care, staying in touch with other people and welfare benefits.

Often people who phone our Helpline are in the middle of a crisis – they could be desperately trying to find a care home for an elderly parent; they might be an older person who's struggling to cope financially and can't pay the bills... So it's a great relief to them to be able to talk it through and be given clear, professional, confidential advice.

If the older person the volunteer supports needs information and/or advice, please direct them to our Helpline on 0800 319 6789. Our experts will be able to give them all the information and advice they need.

Volunteer Team

Looking for information on our internal policies and procedures?

Independent Age has a Volunteering Team as a dedicated phone line and email that can further support you in your role. You can contact them on volunteering@independentage.org or 020 7605 4255.

They develop policies and procedures to support volunteers in their role, including safeguarding, lone working, expenses policy, data protection and problem solving. They can provide you with forms or other resources you may need or they can signpost you to the best person that can help you.

Recording and Reporting

Induction Checklist

Confidentiality and
data protection forms

Expenses forms and
diary sheets

Monthly reports



There are some operational requirements all volunteers need to fulfil in order for us to make sure both, the older person and the volunteer are safe and the volunteering relationship is enjoyable for both parties. It is important all volunteers comply with the reporting mechanisms we have in place.

The welcome pack is given to each new volunteer at the start of their volunteering. It contains useful information for their roles, such as forms, policies and procedures and the volunteer handbook.

Your WPO will complete the induction checklist with you during your initial meetings. These checklists will make sure everyone has a thorough induction, which is important in a volunteering role where volunteers are unsupervised in between catch ups.

Confidentiality & Data protection form

Internal Use Only	DPP03B_Volunteers Confidentiality and Data Protection Commitment Form
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Volunteers Confidentiality and Data Protection Commitment Form

SUMMARY POINTS

Independent Age has an obligation to protect all forms of information - its own and especially that of others who have entrusted their information to us in order to provide them with a service. We do this by following the requirements of the Data Protection Act 1998.

This agreement indicates that you are aware of your responsibilities to keep personal and sensitive information safe and secure and not to divulge it to others who **do not need to know** or are **not authorised** to view this information. If in doubt of who is authorised to view certain types of information, please seek the advice of your Independent Age contact in the first instance, or the Independent Data Protection Officer in their absence.

The agreement also highlights Independent Age's commitment to keep your own personal information securely and not divulge it to any other party without your explicit consent or unless required by law.



We have already talked about Data Protection. All volunteers need to read, sign and abide by it.

We send them this form as part of their postal welcome pack. We expect to receive all forms signed within their first month volunteering. If not received, the Independent Age contact of the volunteer should help us to ensure the form is signed and returned to us (in the London office).

Monthly reporting

Assessing Volunteer Monthly Report

Please complete this report and send it to your Independent Age contact monthly. Remember to comply with data protection and use unidentifiable information.

Service user ThankQ number	Date assessment completed	Date and type of review call completed: <ul style="list-style-type: none"> • Stage 3 assessment • Touchpoint call • 1 month review • 3, 6, 12 or 18 months review 	Anything outstanding (general comments only) <i>Include information such as: Red flags identified, WPO follow up, incomplete risk assessment, monitoring questions missing...</i>
010334555 JT	30.01.2018	Stage 3 assessment	Lives with family member, monitoring questions no completed
8889977 TF	1.2.2018	Touch point call	All ok. Looking forward to having a volunteer
0009999 LM	5.2.2018	12 months review	Red flag: mental health/ confusion...



There are some monthly reports forms that you should complete as part of your role.

They will give your WPO a clear picture of what you have been involved in that month and if there are any concerns they should be made aware of.

Remember: for monitoring and best practice procedures, all assessment forms need to be returned to your WPO as soon as possible after the assessment takes place.

Handout 13: monthly reports

Recap on information points

Wellbeing Project Officer – Name, number

National Wellbeing Manager – Name, number

Out of Hours Safeguarding 020 7605 4455

Helpline 0800 319 6789

Volunteer line 020 7605 4255



Thank you!



Ask them if they have any questions which haven't been answered. Revisit their initial expectations and challenges and check if everything has been covered.

Encourage them to anonymously complete the online feedback form so we can hear directly from them what they think of the content and session:

<https://www.surveymonkey.co.uk/r/VoIVisTraining>

Finish by reinforcing them in their role and skills. And thank them for their time 😊

Feedback forms: <https://www.surveymonkey.co.uk/r/VoIVisTraining>

References on the data for slide 3

England, Wales and UK References:

1. Households Below Average Income 2013/14, Department for Work and Pensions, June 2015 (This refers to income 60% or less than median average income after housing costs)
2. The overlooked over-75s, Independent Age, May 2016
3. Income Related Benefits, Estimates of Take-up, Department for Work and Pensions, June 2015 - £3.7 billion stated link (Age UK Chief Economist Report, June 2015)
4. ADASS Budget Survey 2015: Report Survey 2015 report, June 2015, ADASS
5. Facts about carers, Carers UK, October 2015
6. Caring into later life, Age UK and Carers UK, April 2015
7. Caring into later life, Age UK and Carers UK, April 2015
8. Alzheimer's society, media webpage April 2016 (being conservative on this number as they say over 1 million by 2025. Keeping it to 2030 to be consistent with our messaging and the fact this number has been contested)
9. Fall prevention: New approaches to integrated falls prevention services, NHS Confederation, April 2012
10. Families and Households: 2015, ONS, November 2015 (Figure 9)
11. Loneliness research webpage, Campaign to End Loneliness website, accessed April 2016 (This refers to 11% of older people not having spoken to family, friends or neighbours in the past month). 1 million is 10% of the UK 65+ population.
12. Loneliness research webpage, Campaign to End Loneliness website, accessed April 2016
13. <http://www.bbc.co.uk/news/uk-23988342>

Scottish References:

1. Independent Age report on the over 75's
2. [Age Scotland report on loneliness](#)
3. Scottish Government 2015 report on carers data <http://www.gov.scot/Resource/0047/00473691.pdf>
4. NHS Scotland information <http://www.healthscotland.scot/population-groups/older-people>
5. [Scottish government 2015 report on poverty](#)

