

# Independent Age

## Local Ambassador Volunteer Training



### **Pre-course content:**

- **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, there are no "silly" questions,

...

## Training content

- Common issues affecting older people
- Understand your role as a Local Ambassador Volunteer
- Other Volunteering Roles
- The issues that arise in supporting older people
- Recording and Reporting



We acknowledge that some of you will have experience in other organisations or in similar roles but this training is about how it applies to Independent Age. The aim is 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. But let's set some ground rules about this so we can manage our time better. (set ground rules for questions, eg. at the end of the slides, when prompted, ...)

In the training, we are going to look at:

- Older people's issues
  - Verbal identity
  - The people we support
  - The volunteer roles we offer
- The LA role, including:
  - Your role and the tasks you do
  - Protecting people when volunteering: Issues that arise when volunteering. We will look at:
    - Lone working
    - Safeguarding refresher
    - Confidentiality and Data protection
  - Boundaries of the LA role

- The support for the LA and how to keep in touch with the WPO, including where to find help/resources within IA: Advice line and Volunteering
- Recording and reporting: Which forms to use/ frequency of use:
  - Confidentiality & Data protection form
  - Expenses forms & diary sheets
  - Monthly reports

## Older people's issues

Loneliness  
Money  
Support and care  
Health  
Housing  
Working later in life



### **(Recap or Remove for current volunteers)**

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

**Group question to check awareness: 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.

These are some of the **reasons** we need Local Ambassador Volunteers:

- to make sure we reach even more older people and volunteers
- So that the general public have more information about the work we do
- So people know the help we offer and where to find resources within IA

We will supply you full data on statistics as part of the training toolkit.

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

**Loneliness:**

- Around 40% of older people say the television is their main form of company. Ref. 3
- 2 million people aged 75 and over live alone in the UK. Ref. 1
- 1 million older people in the UK haven't spoken to anyone they are close to in the past month. Ref.2

### **Money:**

- 1.6 million pensioners live below the poverty line in the United Kingdom. This is 14% of the pensioner population. Ref.7
- 20% of older people aged 75 and over are living below the poverty line – this includes 25% of all single women aged 75 and over. Ref.8
- £3.7 billion of benefits go unclaimed by older people each year. Ref. 9

### **Support and care:**

- More than 400,000 fewer people received a social care service in England in 2014/15 compared with 2009/10 (this will disproportionately affect older people). Ref.12
- 3 in 5 of us will become a carer at some point in our lives. Ref.4
- 1.3 million carers are aged 65 and over in England and Wales. Ref.5
- There are almost 90,000 carers aged 85 and over. Ref. 6

### **Health:**

- Dementia could affect up to 1 million people by 2030 (currently around 850,000 affected). Ref.10
- Half of all people aged 80 and over will suffer a fall each year. Ref.11

### **Working later in life:**

- Since 5 October 2012, the law changed 'the default retirement age'. This means firms can no longer ask employees to leave on grounds of age alone.
- The changes will see 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.
- The 2011 Census in England and Wales found a rise from 8.7% to 16% for people aged 65 to 74. Ref.13

### **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 Local Ambassador Volunteer.

*(If asked, For the research into our verbal identity, Independent Age 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 LA is to communicate and live our values and principles while volunteering for Independent Age.

*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.

## The volunteer roles

- Volunteer Visitors
- Telephone Volunteers
- Assessing Volunteers
- Coordinating Volunteers
- Peer Support Volunteers
- Training Volunteers



These are some of the roles we currently offer and are advertised in our website.

Independent Age offers **Friendship Roles** in the form of (between others) Volunteer Visitors and Telephone Volunteers who regularly either visit/call an older person. The aim of our Friendship 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.*"

### Assessing Volunteers

Assessing Volunteer, assess the suitability of the older person for receiving the services Independent Age provides, including face to face friendship services.

### **Coordinating Volunteer**

Coordinating Volunteers play a key role in building up a relationship with and supporting a small group of up to 10 local volunteer visitors. Coordinating Volunteers, keep in close contact with their volunteers, providing one-to-one support and organising networking meetings and training to ensure the best possible delivery of our friendship and support services in their local area.

### **Peer Support Volunteer**

Peer Support Volunteers work alongside Wellbeing Project Officers and Coordinating Volunteers in the support and mentoring of a small group of older people and local volunteers. They keep in close contact with volunteers, providing mentoring to ensure the best possible delivery of our friendship services in their local area. They also check in with the older people to ensure they're getting the support they need.

### **Training Volunteer**

Training Volunteers work alongside Independent Age staff to deliver training sessions and peer-learning workshops to volunteers using prepared presentations.

*Handout 2: Volunteers roles briefing sheet*

## Other services we offer



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### **Advice and information**

We give free, confidential advice over the telephone for older people, their families and carers on issues such as getting help at home, adaptations, care assessments, paying for care, staying in touch with other people and welfare benefits. We also produce free guides and factsheets.

Our free advice line is 0800 319 6789 and is open Monday to Friday, 8am-8pm, and Saturday, 9am to 1pm. Our advice guides and factsheets can be ordered by calling our Helpline or downloaded free from our website at [www.independentage.org](http://www.independentage.org).

### **Campaigning**

We believe older people are entitled to a fair deal. We use the knowledge and insight gained from our frontline services to challenge poor care and campaign for a fair deal for older people – a reasonable standard of living, fair access to information and an opportunity to contribute to their communities.

## Your role...



### **Questions (pairs or big group):**

- **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!**

The focus of the role is on promotional activities. Clear recording and reporting is essential so we can keep track of the activity done, identify areas to target, demonstrate impact and pick up on any issues quickly.

Some of the tasks you will be involved in are:

- Use/ develop your knowledge of the local area to identify new opportunities and build relationships for new referral opportunities, presentations, volunteer fairs... You will need to do online research, use local authority guides, register with agreed organisations,... so you are aware of what is going on in the area.
- Once those opportunities have been identified, you will work alongside your Independent Age contact in identifying what activity to focus on and attend the agreed events. It could be a Volunteering or a Wellbeing Fair or an event targeted to older people.
- You will help disseminate information, like guides or leaflets in

your local area.

You can *show them some of our information/ publicity materials guides/ leaflets*

## Support or lead on presentations



If you are comfortable with public speaking, you can either support or lead on presentations at local events and meetings. You will always have the support from your Independent Age contact as well as supporting materials such as an organisational presentation and Frequently Asked Questions, so you feel confident in your role.

The aim of the presentation is to inform local people about Independent Age and the work we do. The “ask” might change from encouraging people to make more referrals for older people, engaging more local volunteers or raising awareness of our Helpline.

Your Independent Age contact will work with you to adapt the existing materials to the specific request. And remember, it is ok not to know all answers, you can always make a note and your Independent Age contact will pick it up.

*Materials relevant on the toolkit: External presentation and FAQ*

## Presentations good practice



***Discussion exercise: Think about a good presentation you've attended and write three things that made you remember it. Now do the same exercise but thinking on a bad presentation.***

***What are the differences between both of them?***

*You can find more information on effective presentations on the Hand-out 3 on Presentation skills*

## Making an impact



### **Creating a good impression**

Creating a good impression requires 'impression management': give a good impression from the moment you arrive (and even before, by being professional and efficient about arrangements).

### **How you look – I am sure you know this already, but to remind you**

Dress to match the group (or slightly smarter) and look neat and professional. If possible, carry your materials neatly and coordinated

Body language: open and purposeful. Open hand gestures, grounded with your feet, head high, good eye contact (remember ordinary conversational eye contact is about 60%, in this greeting phase aim for about 70%)

With those in mind, as you arrive, you are creating a powerful impression.

### **The 'margins of the meeting' can be as important as the meeting itself.**

You need to see this period as the prelude to the meeting so start by expressing interest in the people:

- Ask questions about them

- Clarify technical issues (eg check the projector is working if you are going to be giving a presentation)
- Clarify any contextual issues (eg whether there have been any changes in circumstances)

### **Be Confident**

It is important to appear confident as people take you based on the way you present yourself. Feeling nervous is normal, and usually you are the only person who can see or feel them. Some tips to appear confident, are listed below. To appear confident you should:

- maintain eye contact
- speak so that everyone can hear
- appear relaxed
- engage/communicate with others, rather than with yourself
- appear to know what is expected of you
- refer to other people's concerns/ what other people have said/ to other people present

## Making a connection with people



### **Communication – making a connection**

#### **Exercise: What can you do to engage with people? What are good networking skills?**

- **Use our standard wording as an effective 15 – 30 second introduction**

Don't be stuck for words when someone asks you what your organisation does and use our introductory paragraph a standard way of saying what we do in a way that the key messages of the organisation can be easily understood and transmitted, -and deliver it in an up beat way with a smile 😊

- **Be passionate**

Be memorable for the right reasons. Have confidence in Independent Age – passion is warming and infectious!

- **Don't talk at people**

You know more about Independent Age than the people you are talking to. You are there to give them useful information about what we do. By maintaining a dialogue and being interested in them you can learn what are the Independent Age services they are interested in: Information and advice, volunteering,... and you might be able to encourage them to engage with us in different

ways.

- **Listen more than you talk**

Aim for the 20/80 rule – where you talk 20% of the time. Make sure you are really listening. Many people say that the thing they hate most (and dread most) is to find themselves talking to someone who is looking over their shoulder to see if there is a person more interesting/ important/ well know to talk to.

Active listening involves eye contact (at least 90%), body language (mirroring, open, occasionally nodding) and asking questions.

- **Don't be afraid to ask**

People like to be asked. Ask someone to introduce you to someone else. Ask for help. Ask for directions. Ask for an opinion. Ask for clarification. Before going to an event, ask yourself, what would like to ask for there?

- **Information leaflets**

Have a supply of different leaflets on the services we do with you at the events. They can be very handy at explaining all the different areas we are involved in.

- **And remember: always be yourself!**

We all like people who are genuine, so be your real self.

## Protecting people when volunteering

Lone working

Boundaries

Safeguarding

Data protection



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.

We have policies and procedures in place to protect volunteers. All policies, procedures and forms are included in your Training Toolkit (including examples on how to fill them in) and they are also part of all volunteers' Welcome Pack.

## Lone Working and keeping safe



### **Emphasis on 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?**

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

**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?**

*Some of the ideas that might come up:*

*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*

### **How do volunteers protect themselves?**

Ensure they read and understand the Lone Working Policy and guidance taking personal responsibility for following and adhering to it

Complete this Training

During the application process provide 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.

**Prior** to visits taking place the volunteer should let their trusted contact know the details of where they are going, including:

- full address with postcode
- The contact details of your Independent Age contact
- The expected duration of the home visit including planned start and finish times.
- and if there has been a change in plans

### **Staying safe when out and about:**

- Plan your journey carefully
- Charge your phone and save the key contact numbers
- 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.*

# 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: .....



The Risk Assessment & Vulnerability Management Plan is to be completed for each 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.

If risks are identified, then mitigating actions will be agreed and implemented before volunteering. Your Independent Age contact will discuss the Risk Assessment, with you, identifying any other risks and adding them to the form together. A volunteer must agree to accept any additional risks before any volunteering can take place. It is the volunteer's responsibility to inform their Independent Age contact of any perceived risks.

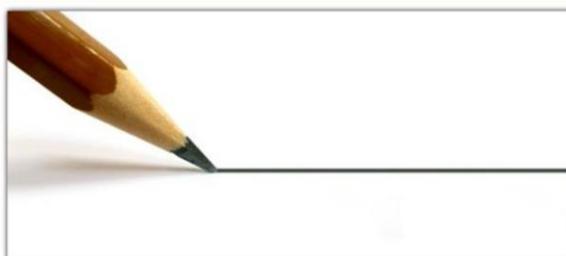
The volunteer keeps a copy of the assessment and the Independent Age contact uploads the Assessment on to the volunteer's ThankQ record.

## Boundaries

**What are boundaries?**

**Think about your own personal boundaries**

**Why do we need them in volunteering?**



**Start an open discussion with these prompts on the slide.**

As everyone volunteers on their own, boundaries are critical.

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

## Your role is not to...

Provide advice outside your role  
Attend events without prior agreement  
Create or adapt presentations materials  
Give out your personal contact details  
Share any personal details of anyone connected to Independent Age without prior permission  
Accept gifts

Fundraise on our behalf without prior permission  
Visit/ call an older person



### **Now, think yourself in your role as a Local Ambassador Volunteer, what are the areas that are not part of your role?**

The role boundaries we have put in place are 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 have other roles that do some of those activities, eg. Fundraising. Or visiting,... You may want to take on another role, and we will be delighted, but we need to know who is doing what and give a true reflection of what volunteers do.

*Handouts 4: LA boundaries*

# Safeguarding



## Safeguarding Short Guide

Independent Age Safeguarding Policy and Procedures aim to protect the older people we support from avoidable harm, enabling them to get the outcomes that they themselves want. All staff and volunteers have a key role in preventing harm or abuse from occurring and in taking action when concerns arise.

### What is safeguarding?

Statutory guidance defines safeguarding as: "Protecting an adult's right to live in safety, free from abuse and neglect." The Aim of Safeguarding is:

- To stop abuse and neglect where possible
- To prevent harm and reduce the risk of neglect to adults.

### What is an adult at risk

An adult at risk is defined in the Directors of Adult Social Services (ADASS) Guidelines 2011 as "anyone with social care needs who is or may be at risk of significant harm".

### What is abuse?

"A violation of an individual's human and civil rights by any other persons."

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

The different types of abuse are:



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?**

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

### **Aim**

To stop abuse and neglect where possible

To prevent harm and reduce the risk of neglect to adults

In your role, it is not likely that you will have many grounds to have a safeguarding concern, but it is important to have an understanding of safeguarding as it is everyone's responsibility.

**Remember: Always pass on any concerns about safeguarding to your Independent Age contact as soon as you are made aware of them or call the Out of Hours number on 020 7605 4455 after 5pm**

*Handout 5: Safeguarding Short Guide*

## Confidentiality and Data Protection

### Do

- Comply with Independent Age Data Protection guidelines
- Keep sensitive printed information in a secured lockable drawer or cabinet
- Use your secure Independent Age email address to send personal or sensitive information
- Always share any concerns with your Independent Age contact

### Don't

- Reveal any sensitive company information to anyone outside of Independent Age
- Disclose your personal and/ or contact details
- copy/ store information on to another medium, like an external hard disk or a USB key.



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

### **Exercise: What information and resources do you think will be confidential relating to this role?**

**Below there are some examples, reinforce editing presentations and storing them in an external hard disk or a USB key.**

This slide reinforces some of the steps/ precautions you should take around confidentiality. For more in depth guidance refer to those guidelines and the Data Protection Manual.

In your role you might be dealing with some 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 do not copy/ store information on to another medium, like an external hard disk or a USB key.
- Your mobile 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.
- Always use your secure Independent Age email address to send personal or sensitive information to your Independent Age contact.
- If delivering training or giving presentations on behalf of Independent Age should use only Independent Age approved materials and these should not be edited (without your Independent Age contact's agreement)

## Support for Local Ambassadors



### Induction and Training

- As part of your role, you have already completed online safeguarding
- In the Volunteer Welcome Pack there is a useful "About us" presentation that takes you through our history and work
- As we develop more training opportunities we will let you know what is available and how you can access it

### Support from your Independent Age contact

Your Independent Age 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
- Any time there is a concern, it doesn't matter how small it is, just call them or send them an email

### The Helpline

We have expert advisers who give advice to older people, family and carers 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.

When people need 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 and also to signpost them to other agencies.

### **Volunteer Team**

Independent Age has a Volunteering Team with a dedicated phone line and email and they can further support you in your role. You can contact them on [volunteering@independentage.org](mailto: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 volunteer is safe and they enjoy the role. 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 Independent Age contact will go with you through the Induction Checklist, which covers all areas/ topics that you need to be aware of to volunteer confidently in your role.

We will cover the others in the next slides.

## 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 volunteers' postal Welcome Pack. We expect to receive all forms signed within their first month volunteering. If not received, your Independent Age contact should help us to ensure the form is signed and returned to us (in the London office).

***For info only:*** *The Data Protection Act, 1998, has eight principles that underpin how an individual's data should be used:*

- 1. Data should always be used fairly and lawfully.*
- 2. Data should only be processed for a specified purpose.*
- 3. Data collected should be adequate, relevant and not excessive.*
- 4. Data should always be accurate and kept up to date.*
- 5. Data should not be kept any longer than necessary.*
- 6. Data should be processed in line with data subject's rights.*
- 7. Data should always be secure and only accessible to those who need to view it.*
- 8. Data should not be transferred to other countries without adequate protection.*

*Hand-out 6: Data Protection Manual*

# Diary sheet

VOLUNTEER DIARY SHEET													MEMBER Name									
SURNAME													1									
FIRSTNAME													(optional)		2							
ADDRESS													3									
POSTCODE																						
YOUR REFERENCE NO.																						
dfdsf													Face 2 Face Volunteers			Telephone Service		Volunteer Support				
DATE	VOL. REF	MEMBER NO.	ROLE CODE	ROLE DESCRIPTION	BEFRINDING - HOME VISIT	BEFRINDING - TELEPHONE CALL	BEFRINDING - OUTINGS	TRAVEL	TELEPHONE BEFRINDING	ASSESSMENT VISIT	DELIVERING TRAINING	RECEIVING TRAINING	F 2 F SUPERVISION	TELEPHONE SUPERVISION	ADMIN	PUBLICITY MARKETING	FUNDRAISING					
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KEY ROLES:   
 VV - Volunteer Visitor   
 OV - Organising Volunteer   
 TV - Telephone Volunteer   
 AV - Assessing Volunteer   
 FRV - Fundraising Volunteer   
 CV - Campaign Volunteer   
 TRV - Training Volunteer   
 ADV - Admin Volunteer



As we increase the range of services and number of people we support, we need this information to evidence the impact of volunteers and the time that our volunteers invest. Full Instructions are in the volunteers' Welcome Pack. Volunteers should return these form electronically on a monthly basis to their Independent Age contact for uploading onto our systems.

## Instructions:

- Completed on a computer using excel 2013 or later programme.
- Complete this form with the number of hours for each activity.
- Use quarter hour breakdowns i.e. .25 = 1/4 hour, .50 = half an hour, .75 = 3/4 hour and\or whole hours.
- DO NOT use any letters e.g. hrs.
- We need the older person reference numbers to comply with data protection and to ensure that the data is uploaded onto the correct person's records.
- You should also record admin time, calls, attendance to events or training,...
- You should email them back monthly to your Independent Age contact.





## 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 😊

## 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](#)



## Organisational Values

### **Older people and independence**

We put older people and independence at the heart of everything we do

### **Work together**

We work together internally and with outside partners to achieve the best results

### **Think big**

We are bold, willing to take responsibility and to adapt when we need to

### **Trust and respect**

We act with honesty, openness and integrity and recognise the contribution each of us makes

### **Be effective**

We deliver a high quality service, using our resources well to deliver value



These are our Values at Independent Age. We are committed to live our values through the way we work, and as such each value needs to be clearly defined with measurable behaviours.