

INFORMATION & ADVICE STATEMENT OF SERVICE

The statement below will be included on Age UK B&NES website I&A page. A notice referring to the statement is pinned to the wall in the reception area clearly stating that it is available as a printed or electronic document on request from an existing or potential client. All other Age UK promotional material and the website will make reference to the statement.

The statement is to be reviewed at least every 6 months and updated if there are any changes to the nature of the service (e.g. a change to opening hours). Once updated the new version will replace the previous document:

- On the Age UK B&NES website
- In the G Drive I&A folder

Information about Age UK B&NES Information & Advice Service for its customers

What services do we offer?

1. Age UK B&NES provides information and advice on a range of issues relating to older people and those who care for and support them. In particular we specialise in:
 - Welfare benefits advice for those over retirement age, including working out benefit entitlements and offering assistance to complete claim forms
 - Helping people identify the care and support they need, including help accessing Social Services and advice on how to pay for care and support
 - Advising on housing issues, including help with maintaining a property and advice on the different types of housing for older people who need more support or want to move nearer to family or friends
 - Advising on the services, support groups, activities and concessions available locally
 - Advising those who are finding it hard to make ends meet or are struggling to pay their bills
 - Helping people to make complaints or challenge decisions about welfare benefits, social services, health services and energy providers

Our service has achieved the national Advice Quality Standard and is being assessed as meeting the benchmarks of the Age UK information & Advice Quality Programme. This ensures we comply with recognised Advice Sector standards of practice and means our information and advice is accurate and high quality.

How do we provide help?

- **Information guides and factsheets.** These cover a wide range of subjects affecting older people and those who care for and support them.
- **Telephone advice.** Call us on 01225 466135 from Monday to Friday between 9.30am and 3.30pm. This call will be charged at a local rate. If you ring outside of opening hours, or if our

receptionist is busy, please leave a voicemail and we will call you back as quickly as possible. Once the receptionist has spoken to the client, their details will be entered onto the Advice Inbox on Outlook and will be dealt with as soon as possible.

- **Office appointments.** To arrange an appointment at our office you can drop into our office or call our Information and Advice receptionist Monday to Friday 9.30am – 3.30pm on 01225 466135. Arranging an appointment in advance lets us prepare for your visit and gives us an opportunity to tell you if there are any important documents we need you to bring along. This means we make the best use of our staff and volunteers' time and can hopefully avoid people having to wait in the office for an appointment.
- **Home visits.** If it would be difficult for you to visit us, we will visit you at home for certain types of advice that can't be provided over the phone. For example, we regularly visit people to complete welfare benefit application forms such as Attendance Allowance. However, home visits are expensive and time consuming so we will ask you about alternative ways we could help. If you would like to arrange a home visit, please contact our Information and Advice receptionist Monday to Friday 9.30am – to 3.30pm on 01225 466135. Our waiting list for home visits averages between 3 – 4 weeks. When we visit you, we will always arrange the time with you in advance and the adviser will carry identification. If you have any concerns about someone turning up at your door who claims to be from Age UK B&NES please ask them to remain outside and ring us on 01225 466135. We can confirm if the person works or volunteers for Age UK B&NES and has appointment with you.

What will happen if we can't provide the service you require?

Sometimes people come to us with problems that we do not have the expertise or knowledge to help with. We are unable to provide consumer debt advice, financial advice or immigration advice.

In these cases we can provide you with basic information and direct you to another organisation for further help. Where possible we will give you a selection of organisations to choose from and we will either signpost or refer you to them.

When signposting, we will give you the organisation's contact information so you can contact them yourself. When referring, we will contact the organisation on your behalf, where appropriate arrange an appointment and provide them with copies of any relevant documents already completed by our service. We will always get your permission before referring you to another organisation.

Sometimes when advising you we will reach a point where we don't have the expertise to pursue your case any further. This most commonly happens when there is a need to challenge a welfare benefit decision. We will refer you to another local advice service that can help you if this happens.

How our service treats its clients

We follow five key principles when delivering our service.

The service is provided free of charge

You won't be charged for any of our information and advice. If we signpost or refer you on to another organisation, we will tell you if there is any charge for their service. While we provide help free of charge, running the Information and Advice Service is expensive and only some of the money to do

this comes from external funding. Any donation you can make will be greatly appreciated. If you wish to donate, please ask one of our staff or volunteers about Gift Aid.

The information and advice we provide is independent of any outside influence

We will never recommend a service or provider to you, including Age UK's own services. Where possible we will always provide you with a choice of alternatives and help you make an informed decision. We are not bound by local or national government policies and will always advise you on what is best for you rather than what is best for the council, the Department for Work and Pensions, Age UK or any other organisation. We will never advise someone to do anything illegal or fraudulent.

All information is confidential

Any information we keep about you is stored securely and only viewed by staff and volunteers involved in advising you or other people that you have allowed us to share this information with. These may be external auditors that check the quality and accuracy of our work, organisations we are referring your case on to and agencies we are dealing with on your behalf (such as the DWP or an energy supplier). We won't share your information or discuss your case with anyone outside of our service without your consent unless they have been given responsibility to act on your behalf by the Court of Protection or Department for Work and Pensions. You have the right to withdraw consent - see our Privacy policy on our website <https://www.ageuk.org.uk/bathandnortheastsomerset/>

We may share information about someone without their consent if:

- We are concerned that someone involved in a case is at risk of abuse or harm or there is a possibility of abuse or harm to others. In this case we may notify a relevant statutory body, for example social services or the police. These disclosures will be done following Adult Safeguarding procedures that our staff and volunteers have been trained in.

Any data we hold about you is processed in accordance with data protection legislation and Age UK B&NES Data protection policy. A copy of our data protection policy is available at <https://www.ageuk.org.uk/bathandnortheastsomerset/> or by calling 01225 466135. You have a right to view any data we hold on you and can request to view it by making a **subject access request**.

Clients are treated with fairness, dignity and respect and we expect clients to treat our staff and volunteers in the same way

We won't judge anyone based on their age, disability, gender, marriage or civil partnership, pregnancy and maternity, race, religion and belief, sex or sexual orientation. We won't judge anyone based upon the circumstances they find themselves in and we won't try to influence the decisions you make following our advice. Sometimes clients will make a decision that we don't think is in their best interest. We will tell them if that happens and aim to provide enough information and advice to help them make an informed choice. We will respect whatever decision they then make. The Information & Advice Service operates in compliance with Age UK B&NES Equalities and Diversity Policy. A copy of the policy is available at <https://www.ageuk.org.uk/bathandnortheastsomerset/>

Our service is as accessible as possible for older people

Our offices are suitable for people with disabilities. We have ground floor step free access to our reception and interview points, we have a grab rail at the entrance lobby and hearing loops. We do not have an accessible toilet but there is a public toilet approximately 40 yards from our office.

Where clients have difficulties accessing or understanding our information and advice, for example because of a disability or language issue, we will take all reasonable steps to provide our service in a manner that is accessible and appropriate to their needs or circumstances and we will always aim to give you as much time as you need when we see you. The Information and Advice Service operates in compliance with Age UK B&NES' Equalities and Diversity policy. A copy of the policy is available at <https://www.ageuk.org.uk/bathandnortheastsomerset/> or by request on 01225 466135.

How to make a complaint, compliment or suggestion about our service

If you would like to compliment or make a suggestion about our Information & Advice service please contact our Quality Supervisor Clare Core either in writing at 18 Kingsmead Square, Bath BA1 2AE or email clare.core@ageukbanes.co.uk or by telephone on 01225 466135.

If you wish to make a complaint, please follow Age UK B&NES' complaints procedure. Details of how to complain are on the Age UK B&NES website or you can request details by calling 0225 466135.

What we ask of our clients

In return for providing information and advice we expect you to:

- Treat our staff and other clients with courtesy and respect
- Provide us with accurate and truthful information about your circumstances
- Attend appointments or let us know in advance if you can't, if possible
- Inform us of changes in your circumstances which may be relevant to your case
- Provide us with information or paperwork that we need for your case
- Notify us of the outcome of welfare benefit applications we have assisted you with

How you can help us

Our Information and Advice team gain satisfaction from our work and the positive impact we have on our clients. We don't expect any further form of recognition or gifts. And while thank you gifts are lovely to receive, there are other ways you can support us so we can continue to provide the service.

- Make a donation – You can do this in the following ways: by cheque made payable to Age UK B&NES, by cash, by a Charities Aid Foundation voucher, online: <https://www.ageuk.org.uk/bathandnortheastsomerset/get-involved/donate/> or by credit/debit card using a donation form. Please make it clear when you make a donation if you wish to donate specifically to the Information & Advice service. And if you are a taxpayer please ask us about 'gift aid'.
- Volunteer – a variety of roles are available, please contact the volunteering co-ordinator for further information.
- Consider giving us consent to allow us to compile a case study of your experience of our information and advice service and the difference it has made to you (you may be approached by your adviser regarding this).

- Campaign for us by writing to your councillor or MP to tell them how helpful you found us.
- Purchase a service or product from us. The Age UK group offers a wide range of products and services specially designed for people in later life. For more information please call 0800 169 18 19
- Join in our activities. Age UK B&NES provides a range of activities for older people. These include: Art groups, singing groups, lunch clubs, book groups, coffee drop ins, Tai Chi, walking and exercise groups. Please call 01225 466135 or go to our website <https://www.ageuk.org.uk/bathandnortheastsomerset/> for further information.
- Join Age UK's weekly lottery and you will have the opportunity to win up to £25,000 while also financially supporting our charitable work – for more information contact 0800 849 6070.
- Tell others about our service and recommend us to your friends