



# Recruitment Pack

Finance & Operations Assistant



**'Improving life for older people in Lewisham and Southwark'**

Age UK Lewisham and Southwark is a registered charity (No. 296862) and company limited by guarantee. Registered in England and Wales No. 2118525. Registered Office: Stones End Centre, 11 Scovell Road, Southwark, SE1 1QQ

## This pack contains the following sections:

- About Age UK Lewisham & Southwark
- How to apply
- Job description and Person Specification
- Equal Opportunities Policy

# About Age UK Lewisham & Southwark

Age UK Lewisham and Southwark (AUKLS) is a charity registered with the Charity Commission (296862) and a company limited by guarantee registered in England and Wales (02118525). Age UK Lewisham and Southwark has been working in the boroughs of Lewisham and Southwark for over 40 years and is a leading voluntary sector provider of services to older people in both London Boroughs. Our head office is located in the fully accessible Stones End Centre in the heart of Southwark

## Our Vision

To ensure that every older person in Lewisham and Southwark is valued, respected, cared for and able to live their life in dignity and, we hope, happiness.

## Our Charitable Objects

To promote the following purposes for the benefit of the public and/or older people in and around Lewisham and Southwark:

- preventing or relieving the poverty of older people;
- advancing education;
- preventing or relieving sickness, disease or suffering in older people (whether emotional, mental or physical);
- promoting equality and diversity
- promoting the human rights of older people in accordance with the Universal Declaration of Human Rights;
- assisting older people in need by reason of ill-health, disability, financial hardship, social exclusion or other disadvantage;
- helping families and carers of older people;
- working with statutory and voluntary agencies; and
- such other charitable purposes for the benefit of older people as the Trustees may from time to time decide

## Our Values

- Fairness and equality as service provider, employer and partner
- Recognising older people as individuals with diverse talents and needs
- Being open to partnerships and collaboration with individuals and organisations in all sectors
- Being a dynamic, credible, trusted and a sustainable organisation

## Our Services

AUKLS works to ensure that services are flexible, responsive and pertinent and are passionate about delivering services that match our ethos and values. There is great variation within the older people we support, and the variety in the services we deliver reflects this, ranging from complex care services to

**‘Improving life for older people in Lewisham and Southwark’**

smaller projects, these include:

- Day Care – supporting mentally and physically vulnerable older people
- Safe & Independent Living & Care Navigation – first contact and social prescribing services acting as a bridge between multiple services and older people and providing access to diverse community & statutory services
- Healthy Living & Learning Initiatives - open access activities and social opportunities to re-able and empower
- Community Development Work - support to local groups and organisations to address gaps and capacity in service provision.
- Handypersons – free practical support within the home & garden
- Help at Home & Happy Feet- not-for-profit services enabling older people to maintain mobility and independence
- Information and Advice – free, confidential and non-judgemental advice on areas including money advice, housing, consumer issues and community care options.
- Food2You - volunteer home delivery shopping service for older people at risk of, or experiencing, malnutrition

## Our Partners

Age UK Lewisham & Southwark is committed to working in partnership to provide our older people the best services possible. We are currently part of three consortiums; Consortium of Older Peoples Services (COPSINS), Community Connections and Advice Lewisham.

## Our Staff & Volunteers

Our staff team and volunteers are well established and committed to developing the best services with older people in Lewisham & Southwark. We are committed to continually developing staff and volunteer skills through training and peer support. Staff and volunteers are encouraged to suggest new ideas and revisit existing services and activities in our desire to be led by the needs of older people and the community in Lewisham & Southwark.

**'Improving life for older people in Lewisham and Southwark'**

Age UK Lewisham and Southwark is a registered charity (No. 296862) and company limited by guarantee. Registered in England and Wales No. 2118525. Registered Office: Stones End Centre, 11 Scovell Road, Southwark, SE1 1QQ

# How to apply

To apply please complete an application pack. Please ensure that your supporting statement demonstrates how your experience, skills and abilities meet the selection criteria set out in the Job Description and Person Specification. These can be found in the next section of this pack. Please also ensure you complete the equal opportunities monitoring form and Criminal Record declaration

Applications should be returned to us by **9am on Monday 18th February 2019**. Applications received after that time will not normally be considered for short listing. Completed electronic applications must be sent to:

**HR@ageuklands.org.uk**

ensuring you clearly identify in the email the post you are applying for. Applications sent by post should be marked confidential and for the attention of:

**Anne Cleary**  
**Office Manager**  
**Age UK Lewisham & Southwark**  
**Stones End Centre**  
**11 Scovell Road**  
**London**  
**SE1 1QQ**

Due to the high volume of applications received, we regret, we shall not be able to contact applicants who are not short-listed.

## Interview Process

Interviews will take place on **Friday 22nd February 2019**. If you are successful we will contact you as soon as possible after the closing date to let you know what the interview process will entail.

**'Improving life for older people in Lewisham and Southwark'**

Age UK Lewisham and Southwark is a registered charity (No. 296862) and company limited by guarantee. Registered in England and Wales No. 2118525. Registered Office: Stones End Centre, 11 Scovell Road, Southwark, SE1 1QQ

# Job Description

<b>Post:</b>	Finance & Operations Assistant
<b>Salary:</b>	£19,201
<b>Hours:</b>	35hours per week
<b>Responsible to:</b>	Development Manager & Executive Assistant
<b>Purpose of job:</b>	The main purpose of the job is to provide effective finance and accounting support, data entry, processing, reconciling reporting as a member of the Finance Team. In addition to this, to conduct a range administrative and problem solving tasks to support the smooth operation of AUKLS' services.

AUKLS enjoys an open and participative working environment. We work to our core values of being **supportive, flexible, professional and person centred**. These are reflected in the way we work with older people, with each other and with our partners. Teamwork, collective responsibility and delegated authority are central to this process. A key element of all roles is to develop and maintain the organisation's working ethos and culture.

AUKLS strives to provide a supportive working environment for all staff and volunteers in order that they can develop personally and professionally and acquire new skills. The contribution made by staff and volunteers in achieving the organisation's goals is recognised by all.

This job description does not provide an exhaustive list of tasks and activities as all posts within the organisation are subject to evolution as the organisation develops and grows.

## KEY TASKS AND RESPONSIBILITIES

### Finance Support

#### Sales Ledger and Invoicing

- Producing invoices, including day care and help at home, on a regular basis; issuing invoices to clients; preparing and reconciling data for contract and private clients' invoices
- Reconciling amounts received from LB Southwark for personal budgets and following up discrepancies.
- Preparing data on invoices for input into Sage on a monthly basis
- Running statements and outstanding balance reports; maintaining and monitoring debt collection procedures and with relevant managers, liaising with clients on collection of overdue debts
- Preparing regular reports of outstanding debts for review by the Finance Officer

#### Cash Book and Bank Reconciliations

- Check and record cash or cheques received in respect of Daycare, Help at Home, Happy Feet, Lunch Money and others
- Enter receipts and payments into sage Cash Book on a regular basis
- Paying cheques etc. into the bank
- Collecting cash from the bank

**'Improving life for older people in Lewisham and Southwark'**

- Reconciling the current and deposit bank accounts
- Monitoring cash in hand and at bank
- Checking and reimbursing claims for petty cash and entering details of payments into the accounting system

### **Purchase ledger**

- Using the purchase order system to reconcile orders placed with suppliers invoices
- Ensure that invoices received are properly and promptly approved for payment by the relevant budget holders
- Ensure that the Purchase Ledger system is maintained on a regular and timely basis and that payments are made in accordance with suppliers' terms
- Preparing invoices for payment and entry on to Bankline system; arrange for approval by two Bankline signatories
- Reconciling Purchase Ledger balances with suppliers' statements
- Reconciling Purchase Ledger to the control account in the Nominal Ledger
- Maintaining file of purchase ledger transaction reports and purchase invoice filing system

### **Management and Financial Accounts preparation**

As required:-

- Enter budgets into Sage Nominal Ledger
- Produce management reports from Sage 200 and if necessary, using downloads into Excel spreadsheets
- Review for omissions and anomalies
- Liaise with managers and other staff to resolve queries
- Issue reports with commentaries
- Forecast year end results
- Prepare audit files and working papers for annual financial statements

### **General**

- File all invoices, reports and other documents relating to the work of the Finance Department
- Support the Finance Manager and Finance Officer in carrying out their responsibilities, Provide reports and other information as required.
- Maintain good relations with all contacts and other staff/volunteers
- Carry out other duties that may be required from time to time
- Meet deadlines, and manage achievement of these deadlines proactively

### **Operations Support**

- To address any premises issues raised by staff across the 3 office sites efficiently and effectively, ensuring staff and Development Manager are informed of progress.
- To review and manage supplier contracts, researching new suppliers where necessary, including Insurance, I.T support, and Utilities ensuring our records are kept up-to-date
- To support the triaging of I.T and phone related issues
- To support the administrative function of Case Record Management system, Charity Log
- To conduct 6 monthly auditing of I.T records
- To update annually AULKLS' Asset Register
- To provide administrative support to the Development Manager and Executive Assistant function.

**'Improving life for older people in Lewisham and Southwark'**

## **Other**

- To be administratively self supporting

## **ORGANISATIONAL RESPONSIBILITIES**

- Meet legislative and regulatory requirements.
- To establish and maintain effective and efficient administrative systems, including use of database systems.
- Carry out administrative duties in connection with the post
- Provide statistical information in relation to monitoring requirements
- Contribute to the overall achievement of AUKLS mission and objectives
- Provide a supportive working environment to all staff and volunteers
- Actively support AUKLS in carrying out its aim to be an environmentally responsible organisation in carrying out day to day duties
- Ensure the values of AUKLS are upheld across the organisation
- Attend staff and team meetings as requested
- To participate in networking activity with local organisations

## **Promotion of a Supportive Working Environment**

A supportive working environment can be defined as an environment where contribution is recognised, encouraged and rewarded. Staff and volunteers alike expect to be encouraged to develop personally and professionally and to acquire new skills at a pace that is suitable to them. All staff and volunteers must promote this environment as part of their roles and responsibilities.



# Person Specification

The successful applicant must be committed to the promotion of a supportive working environment.

All posts within the organisation are subject to change as the organisation grows and develops. Staff must be able to adapt to change and, therefore, **flexibility** is a key attribute required of all employees.

It is **essential** that the post holder possess the following **personal qualities**:

- Commitment to person centred working
- Drive, energy and enthusiasm
- Flexibility
- Good attention to detail
- Self motivated and able to motivate others
- Friendly, polite and patient with an excellent telephone manner
- Diplomatic and approachable with the ability to develop and maintain positive working relationships across a variety of organisations
- Excellent team working skills
- Commitment to achieving the core aims of the organisation
- Enjoy working as part of a highly diverse staff and volunteer work force

It is **essential** that the post holder has the **following experience and knowledge**:

- Experience of data input
- Excellent working knowledge and understanding of administration systems
- Worked in an office environment
- Experience of liaising with a variety of different partner agencies

It is **essential** that the post holder has the **following skills and abilities**

- Excellent numeracy skills
- Ability to work accurately with good attention to detail
- Good IT skills with working knowledge of Excel, Word, Outlook.
- Ability to identify errors or omissions
- Understanding of basic finance and accounting processes
- Desire to develop skills and understanding
- Ability to successfully work to deadlines
- Highly developed written and verbal communication and negotiating skills.
- Ability to learn rapidly and manage varied information intelligently.
- Good IT skills, including Microsoft word processing, spreadsheets, databases, internet and email and problem solving.
- Excellent organisational skills including information, resources and time management with the ability to set and manage priorities within a busy work environment.
- Ability to communicate well, particularly over the telephone
- The ability to develop and maintain sound processes and administrative systems
- Ability to work flexibly to meet the changing demands

## Other

- Able to travel within LB Southwark

**'Improving life for older people in Lewisham and Southwark'**

Age UK Lewisham and Southwark is a registered charity (No. 296862) and company limited by guarantee. Registered in England and Wales No. 2118525. Registered Office: Stones End Centre, 11 Scovell Road, Southwark, SE1 1QQ

# Equal Opportunities & Valuing Diversity Policy

## EQUAL OPPORTUNITIES AND VALUING DIVERSITY POLICY AND GUIDANCE

### 1 Policy Statement

- 1.1 Age UK Lewisham and Southwark (AUKLS) recognises that we live in a society where discrimination still operates to the disadvantage of many groups in society.
- 1.2 AUKLS believes that all persons should have equal rights to recognition of their human dignity, and to have equal opportunities to be educated, to work, to receive services and to participate in society.
- 1.3 AUKLS recognises that diversity should be celebrated, and that by encouraging diversity in every aspect of its work, allows the charity to access a wider range of skills, talents and perspectives. As such, AUKLS seeks to encourage its workforce to express its diversity where appropriate. Providing equal opportunities and valuing diversity is good management practice and makes sound business sense.
- 1.4 AUKLS is committed to the promotion of equal opportunities through the way we manage the organisation and provide services. In order to express this commitment, we develop, promote and maintain policies that will be conducive to the principles of fairness and equality in the workplace.
- 1.5 AUKLS adheres to the Accessible Information Standard (AIS). This means we will help people who have difficulty accessing and understanding information, and support them to communicate effectively.
- 1.6 The objective of this policy is that no person should suffer or experience less favourable treatment, discrimination or lack of opportunities on the grounds of gender, race, colour, nationality, ethnic origin, religious or philosophical beliefs, health status, HIV status, age, marital status, parental status, sexual orientation, political beliefs or trade union membership, class, responsibility for dependents, physical attributes, ex-offender status as defined by the Rehabilitation of Offenders Act (LASPO 2012), lack of formal qualifications where such qualifications are not formally required, or any other grounds which cannot be shown to be justifiable within the context of this policy.
- 1.7 Legal obligations: AUKLS complies with the Equal Opportunities and Discrimination (Equality Act 2010). The equality act protects people from discrimination based on 9 protected characteristics (age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex/gender, sexual orientation).

**'Improving life for older people in Lewisham and Southwark'**

In practice, adherence to this Act will ensure AUKLS protects its staff, volunteers and service users from Direct discrimination, Discrimination by association (due to association with another individual), Perception discrimination (based on incorrect/correct belief a person possesses a protected characteristic), Indirect discrimination (people who are disadvantaged by possessing a protected characteristic), Harassment and Victimization.

In valuing diversity AUKLS is committed to go beyond the legal minimum regarding equality.

- 1.8 AUKLS acknowledges that UK legislation does not yet cover intersectionality (i.e. that many people from marginalised groups have multiple and shifting characteristics which could potentially be subject to discrimination, and that these characteristics do not exist separately from each other). AUKLS is nonetheless committed to thinking intersectionally wherever possible.

Individuals who cross several intersections are statistically more vulnerable to discrimination (e.g. older people who are also BAME, LGBT+ or disabled). AUKLS is aware that a one-size-fits-all approach assumes similarities between inequalities, and can often be ineffective and exclusive. The complexity by which people experience discrimination as a result of each nuanced intersection should be acknowledged, to prevent those who experience intersectional discrimination having to split their human rights concerns and prioritise certain aspects over others.

Problems experienced by different groups should be viewed holistically wherever possible.

- 1.9 This policy will influence and affect every aspect of activities carried out at AUKLS i.e. promotional work, service provision, partnership and development work and other functions linked to the AUKLS, as determined by the Board of Trustees.
- 1.10 In the provision of services and the employment of staff, AUKLS is committed to promoting equal opportunities for everyone. Throughout its activities, AUKLS will treat all people equally whether they are:
- Seeking or using our services.
  - Volunteers.
  - Applying for a job or already employed by us.
  - Students on work experience or placements.

## **2. Recruitment and Employment**

2.1 AUKLS will strive to be a good employer by ensuring that:

- We will adopt a consistent, non-discriminatory approach to the advertising of vacancies.
- Wherever possible within project budgets, AUKLS will advertise posts or volunteer opportunities through appropriate community or specialist media.
- We will endeavour through appropriate training to ensure that employees, making selection and recruitment decisions will not discriminate, whether consciously or unconsciously, in making these decisions.

### **'Improving life for older people in Lewisham and Southwark'**

- Promotion and advancement will be made on merit and all decisions relating to this will be made within the overall framework and principles of this policy.
- Job descriptions will be revised to ensure that they are in line with our equal opportunities policy. Job requirements will be reflected accurately in any personnel specifications.
- Short-listing and interviewing will be carried out by more than one person where possible.
- Interview questions will be related to the requirements of the job and will not be of a discriminatory nature.
- All applicants who apply for jobs with us will receive fair treatment and will be considered solely on their ability to do their job.
- Selection decisions will not be influenced by any perceived prejudices of other staff.
- All staff and volunteers have access to appropriate induction period and regular supervision.
- Employment terms and conditions reflect current legislation, good practice and fairness.
- We appoint staff within an agreed framework of terms and conditions.
- We make staff aware of the policies that encourage flexible ways of working, including: right to request flexible working, job sharing and job splitting, reduced hours, time off for dependents leave (approval is subject to appropriateness to the nature of the position).
- Employment and volunteer opportunities are offered to people with disabilities; where possible within project budgets, AUKLS will provide additional aids and equipment or adjustments to the working environment to meet the needs of staff or volunteers with disabilities.
- AUKLS will monitor its recruitment of posts, including the use of different media for recruitment.

## 2.2 Learning and Development

AUKLS believes that all staff, volunteers and trustees should have access to development opportunities in order to carry out their jobs successfully and to be able to contribute as widely as possible to the positive achievements of the organisation. AUKLS will ensure:

- All staff and volunteers are made aware of development opportunities and are actively encouraged to participate in learning (all forms).
- That briefing on this policy forms part of the Induction procedure for trustees, staff and volunteers and that for those who work with the organisation, appropriate training is available to enable employees and volunteers to perform their jobs effectively.
- Monitoring of training and development activities to ensure equality of access across all staff groups.
- Ensuring that development and performance management activities are transparent and based on competence.

## 2.3 Monitoring

We will maintain and review the employment records of all employees in order to monitor the progress of this policy. Monitoring may involve:

- The collection and classification of information regarding race in terms of ethnic/national origin and sex of all applications and current employees;
- The examination by ethnic/national origin and sex of the distribution of employees and the success rate of the applicants; and
- Recording recruitment, training and promotional records of all employees, the decisions reached and the reason for those decisions.

## 'Improving life for older people in Lewisham and Southwark'

The results of any monitoring procedure will be reviewed at regular intervals to assess the effectiveness of the implementation of this policy. Consideration will be given, if necessary, to adjusting this policy to afford greater equality of opportunities to all applicants and staff.

### **3. Volunteers**

AUKLS will:

- Promote volunteering to Lewisham & Southwark residents who are disadvantaged or who are from marginalised groups.
- Recognise the fact that volunteers come from a broad cross section of the community and bring a diverse range of skills, experience and interests.
- Recruit volunteers for part-time and full-time roles and for assignments of different durations.
- Ensure that all volunteers are made aware of the equality and diversity and other policies that inform AUKLS culture and development.
- Make realistic budget provision for supporting volunteers in AUKLS, including the reimbursement of out-of-pocket expenses.
- Ensure that volunteers are encouraged to participate in staff learning opportunities and that their views are considered when developing/implementing policies.
- Monitor take-up of volunteer places to ensure that people from a range of backgrounds are involved in volunteering opportunities.

### **4. Conduct and general standards of behaviour**

All staff and volunteers are expected to conduct themselves in a professional and considerate manner at all times. AUKLS will not tolerate behaviour such as:

- making threats
- physical violence
- shouting
- swearing at others
- persistent rudeness
- isolating, ignoring or refusing to work with certain people
- telling offensive jokes or name calling
- displaying offensive material such as pornography or sexist / racist cartoons, or the distribution of such material via email / text message or any other format
- any other forms of harassment or victimisation

The items on the above list of unacceptable behaviours are considered to be disciplinary offences within AUKLS and can lead to disciplinary action being taken. AUKLS encourages staff to resolve misunderstandings and problems informally wherever possible, depending on the circumstances. However, whether dealt with informally or formally, it is important for staff who may have caused offence to understand that it is no defence to say that they did not intend to do so, or to blame individuals for being over sensitive. It is the impact of the behaviour, rather than the intent, that counts, and that should shape the solution found both to the immediate problem and to preventing further similar problems in the future.

### **5. Complaints of discrimination**

## **'Improving life for older people in Lewisham and Southwark'**

AUKLS will treat seriously all complaints of unlawful discrimination on any grounds contrary to this policy made by employees, trustees, clients or other third parties and will take action where appropriate.

All complaints will be investigated in accordance with the organisation's grievance, complaints or disciplinary procedure, as appropriate and the complainant will be informed of the outcome in line with these procedures.

We will also monitor the number and outcomes of complaints of discrimination made by staff, volunteers, clients and other third parties, and review this data to inform later development of this policy.

## **6. Older People Who Use Our Services**

As an older person's charity, AUKLS is directly concerned by the ways in which older people, as a group and as individuals, are subject to discrimination. It will work to ensure that its own services and resources become and remain a genuine response to the needs of all older people.

To meet the varied needs of older people AUKLS will:

- Involve older people in the design and delivery of services.
- Recognise that the older population is diverse and that age discrimination is often accompanied by other forms of discrimination and intersectionality.
- Recognise that older people bring a lifetime of knowledge and experience to our relationship with them.
- Ensure our staff are enabled to recognise and tackle age discrimination during their daily work.
- Develop a strategy to improve and extend ways to communicate and involve older people.
- Support marginalised older peoples' groups (small, BAME, new communities, LGBT+ and those disadvantaged by geographical location) ensuring awareness of local decision-making structures and are actively supported to access and participate.
- Continue to develop and to promote new and innovative services within the sector, reaching older people from all communities.
- Where practical, hold meetings, events and training sessions at different times and different days and in accessible venues.
- Monitor the use of AUKLS services by different sections of the community.

## **7. How will this policy be implemented?**

In order to implement this policy AUKLS will:

- Communicate the policy to employees, job applicants, volunteers and relevant others.
- Incorporate specific and appropriate duties in respect of implementing the equal opportunities policy into job descriptions and work objectives of all staff, where appropriate.
- Ensure that those who are involved in assessing candidates for recruitment or promotion will be trained in nondiscriminatory selection techniques.
- Incorporate equal opportunity notices into general communications practices.
- Ensure that adequate resources are made available to fulfill the objectives of the policy.

### **'Improving life for older people in Lewisham and Southwark'**

## **8. Who is responsible for this implementation?**

### 8.1 AUKLS Board of Trustees' responsibility is to;

- Own and monitor implementation of this policy

### 8.2 AUKLS Chief Executive's responsibility is to;

- Take responsibility for delivery of this policy.
- Provide strong leadership on equality.

### 8.3 AUKLS Senior Management and Leadership Team's responsibility is to;

- Act as equality champions and role models.
- Implement this policy and integrate equality into the work of AUKLS.
- Ensure staff and volunteers are fully aware of their individual and collective responsibilities under this policy.
- Respond to allegations of discrimination and harassment fairly, quickly and effectively.

### 8.4 AUKLS line managers' responsibility is to;

- Build specific actions into their team and individual's goals that contribute to the delivery of this policy as part of the organisational, individual and project planning processes.
- Check that staff, volunteers and consultants are aware of this policy and understand their rights and responsibilities contained within it.
- Role model behaviour that supports this policy and challenge those they manage to do the same.
- Allocate their time and support and any training or development opportunities objectively, fairly and without discrimination.
- Communicate regularly with their teams about equality issues in a way that keeps this policy central to our mission.

### 8.5 All staff have a responsibility to;

- Treat others with dignity and respect.
- Report discrimination, bullying, unfair treatment or harassment that they experience or witness
- Help identify discriminatory practices or procedures and bring these to the attention of their line managers, or HR.
- Contribute to creating an inclusive learning environment that values difference.
- Attend mandatory staff training and development events.
- Express opinions constructively with sensitivity and respect.

### 8.6 Our volunteers' roles are to

- Play their part in creating an environment where people are valued and respected.
- Treat others with dignity and respect.

## **'Improving life for older people in Lewisham and Southwark'**

- Report discrimination, bullying, unfair treatment or harassment that they experience or witness
- Help identify discriminatory practices or procedures and bring these to our attention.
- Express opinions constructively with sensitivity and respect.

8.7 Our service providers', contractors' and consultants' responsibility is to operate within the requirements of the Equality Act 2010 and the terms of this policy. A copy of the Equality Policy will be given to all contractors and consultants on request and an assessment of their commitment to complying will form part of any formal tendering process.

# Privacy notice

In accordance with the General Data Protection Regulation (GDPR), we have implemented this privacy notice to inform you, as prospective employees of Age UK Lewisham and Southwark (AUKLS), of the types of data we process about you. We also include within this notice the reasons for processing your data, the lawful basis that permits us to process it, how long we keep your data for and your rights regarding your data.

## A) DATA PROTECTION PRINCIPLES

Under GDPR, all personal data obtained and held by us must be processed according to a set of core principles. In accordance with these principles, we will ensure that:

- a) processing is fair, lawful and transparent
- b) data is collected for specific, explicit, and legitimate purposes
- c) data collected is adequate, relevant and limited to what is necessary for the purposes of processing
- d) data is kept accurate and up to date. Data which is found to be inaccurate will be rectified or erased without delay
- e) data is not kept for longer than is necessary for its given purpose
- f) data is processed in a manner that ensures appropriate security of personal data including protection against unauthorised or unlawful processing, accidental loss, destruction or damage by using appropriate technical or organisation measures
- g) we comply with the relevant GDPR procedures for international transferring of personal data

## B) TYPES OF DATA HELD

We keep several categories of personal data on our prospective employees in order to carry out effective and efficient processes. We keep this data in recruitment files relating to each vacancy and we also hold the data within our computer systems, for example, recruitment logs.

Specifically, we hold the following types of data:

- a) personal details such as name, address, phone numbers;
- b) name and contact details of your next of kin;

**'Improving life for older people in Lewisham and Southwark'**

Age UK Lewisham and Southwark is a registered charity (No. 296862) and company limited by guarantee. Registered in England and Wales No. 2118525. Registered Office: Stones End Centre, 11 Scovell Road, Southwark, SE1 1QQ



- c) your photograph;
- d) your gender, marital status, information of any disability you have or other medical information;
- e) right to work documentation;
- f) information on your race and religion for equality monitoring purposes;
- g) information gathered via the recruitment process such as that entered into a CV or included in a CV cover letter;
- h) references from former employers;
- i) details on your education and employment history etc;
- j) driving licence;
- k) criminal convictions.

### **C) COLLECTING YOUR DATA**

You provide several pieces of data to us directly during the recruitment process.

In some cases, we will collect data about you from third parties, such as employment agencies, former employers when gathering references or credit reference agencies.

Should you be successful in your job application, we will gather further information from you, for example, your bank details and next of kin details, once your employment begins.

### **D) LAWFUL BASIS FOR PROCESSING**

The law on data protection allows us to process your data for certain reasons only.

The information below categorises the types of data processing we undertake and the lawful basis we rely on.

<b>Activity requiring your data</b>	<b>Lawful basis</b>
Carrying out checks in relation to your right to work in the UK	Legal obligation
Making reasonable adjustments for disabled employees	Legal obligation
Making recruitment decisions in relation to both initial and subsequent employment e.g. promotion	Our legitimate interests
Making decisions about salary and other benefits	Our legitimate interests
Making decisions about contractual benefits to provide to you	Our legitimate interests
Assessing training needs	Our legitimate interests
Dealing with legal claims made against us	Our legitimate interests
Preventing fraud	Our legitimate interests

### **E) SPECIAL CATEGORIES OF DATA**

Special categories of data are data relating to your:

## **'Improving life for older people in Lewisham and Southwark'**

- a) health
- b) sex life
- c) sexual orientation
- d) race
- e) ethnic origin
- f) political opinion
- g) religion
- h) trade union membership
- i) genetic and biometric data.

We carry out processing activities using special category data:

- a) for the purposes of equal opportunities monitoring
- b) to determine reasonable adjustments

Most commonly, we will process special categories of data when the following applies:

- a) you have given explicit consent to the processing
- b) we must process the data in order to carry out our legal obligations
- c) we must process data for reasons of substantial public interest
- d) you have already made the data public.

#### **F) FAILURE TO PROVIDE DATA**

Your failure to provide us with data may mean that we are unable to fulfil our requirements for entering into a contract of employment with you. This could include being unable to offer you employment, or administer contractual benefits.

#### **G) CRIMINAL CONVICTION DATA**

We will only collect criminal conviction data where it is appropriate given the nature of your role and where the law permits us. This data will usually be collected at the recruitment stage, however, may also be collected during your employment. We use criminal conviction data to determine your suitability, or your continued suitability for the role. We rely on the lawful basis of legitimate interest to process this data.

#### **H) WHO WE SHARE YOUR DATA WITH**

Employees within our company who have responsibility for recruitment will have access to your data which is relevant to their function. All employees with such responsibility have been trained in ensuring data is processing in line with GDPR.

Data is shared with third parties for the following reasons: the administration of payroll; the administration of your pension; HR procedures in line with our policies as outlined in the staff handbook.

We may also share your data with third parties as part of an organisational restructure, or for other reasons to comply with a legal obligation upon us. This may include fulfilling requests from statutory bodies. We have a data processing agreement in place with such third parties to ensure

### **'Improving life for older people in Lewisham and Southwark'**

data is not compromised. Third parties must implement appropriate technical and organisational measures to ensure the security of your data.

We do not share your data with bodies outside of the European Economic Area.

#### **I) PROTECTING YOUR DATA**

We are aware of the requirement to ensure your data is protected against accidental loss or disclosure, destruction and abuse. We have implemented processes to guard against such.

#### **J) RETENTION PERIODS**

We only keep your data for as long as we need it for, which, in relation to unsuccessful candidates, is six months to a year.

If your application is not successful and we have not sought consent or you have not provided consent upon our request to keep your data for the purpose of future suitable job vacancies, we will keep your data for six months once the recruitment exercise ends.

If we have sought your consent to keep your data on file for future job vacancies, and you have provided consent, we will keep your data for one year once the recruitment exercise ends. At the end of this period, we will delete or destroy your data, unless you have already withdrawn your consent to our processing of your data in which case it will be deleted or destroyed upon your withdrawal of consent.

Where you have provided consent to our use of your data, you also have the right to withdraw that consent at any time. This means that we will stop processing your data and there will be no consequences of withdrawing consent.

If your application is successful, your data will be kept and transferred to the systems we administer for employees. We have a separate privacy notice for employees, which will be provided to you.

#### **K) AUTOMATED DECISION MAKING**

Automated decision making means making decision about you using no human involvement e.g. using computerised filtering equipment. No decision will be made about you solely on the basis of automated decision making (where a decision is taken about you using an electronic system without human involvement) which has a significant impact on you.

#### **L) YOUR RIGHTS**

You have the following rights in relation to the personal data we hold on you:

- a) the right to be informed about the data we hold on you and what we do with it;
- b) the right of access to the data we hold on you. We operate a separate Subject Access Request policy and all such requests will be dealt with accordingly;
- c) the right for any inaccuracies in the data we hold on you, however they come to light, to be corrected. This is also known as 'rectification';
- d) the right to have data deleted in certain circumstances. This is also known as 'erasure';
- e) the right to restrict the processing of the data;

### **'Improving life for older people in Lewisham and Southwark'**

- f) the right to transfer the data we hold on you to another party. This is also known as 'portability';
- g) the right to object to the inclusion of any information;
- h) the right to regulate any automated decision-making and profiling of personal data.

In addition to the above rights, you also have the unrestricted right to withdraw consent, that you have previously provided, to our processing of your data at any time. Withdrawing your consent means that we will stop processing the data that you had previously given us consent to use. There will be no consequences for withdrawing your consent. However, in some cases, we may continue to use the data where so permitted by having a legitimate reason for doing so.

If you wish to exercise any of the rights explained above, please contact the Data Protection Officer in writing to Age UK Lewisham and Southwark, Stones End Day Centre, 11 Scovell Road, SE1 1QQ.

### **M) MAKING A COMPLAINT**

If you think your data rights have been breached, you are able to raise a complaint with the Information Commissioner (ICO). You can contact the ICO at Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF or by telephone on 0303 123 1113 (local rate) or 01625 545 745.

### **N) DATA PROTECTION COMPLIANCE**

Our Data Protection Officer is:

Jacky Bourke-White  
information@ageuklands.org.uk