

DATA SHARING AGREEMENT – HOME ENERGY CHECKS

Dated 15/10 2021

Age UK Reference Number	AUK	EON-SY11-HEC-16
Programme	e.on Warm Homes Programme SY11	
Brand Partner	Age UK Nottingham & Nottinghamshire	

1. Parties

This Agreement is made between:

1.1. Age UK, Tavis House, 1 – 6 Tavistock Square, London WC1H 9NA, registered charity no: 1128267 and company no: 6825798 (**Age UK**);

1.2. The party whose details are set out in the table below (the **Brand Partner**)

Name	Age UK Nottingham & Nottinghamshire
Charity Number	1067881
Company Number (if applicable)	3455485
Address	Age UK Nottingham & Nottinghamshire, The Sybil Levin Centre, 577a Nuthall Road, Nottingham, NG8 6AD

1.3. The Brand Partner must have completed the Organisational Quality Standards and signed the Brand Partner Agreement in order to sign this Agreement.

2. Definitions

2.1 In this Agreement the following terms shall have the following meanings:

Agreement this agreement including any schedules and appendices;

Box a data sharing system which allows people to upload data to a secure site from which data can then be downloaded by those authorised to do so:
<https://www.box.com/en-gb/home>;

Business Day a day other than a Saturday, Sunday or public holiday in England, when banks in London are open for business;

Data Controller, Data Processor, Data Subject, Personal Data, Personal Data Breach and appropriate have the meanings as set out in the Data Protection Laws

technical and organisational measures

Data the data detailed in Schedule A;

Data Protection Laws means all applicable data protection and privacy legislation in force from time to time in the UK including the UK GDPR; the Data Protection Act 2018 (DPA 2018) (and regulations made thereunder); the Privacy and Electronic Communications Regulations 2003 (SI 2003/2426) as amended and all other legislation and regulatory requirements in force from time to time which apply to a party relating to the use of personal data (including, without limitation, the privacy of electronic communications); and the guidance and codes of practice issued by the Information Commissioner or other relevant regulatory authority and applicable to a party.

GDPR General Data Protection Regulation EU 2016/679;

UK GDPR has the meaning given to it in section 3(10) (as supplemented by section 205(4)) of the Data Protection Act 2018.

Purpose the purpose of delivering the Programme;

Supervisory Authority means the Information Commissioner's Office

Term the term of this Agreement, as specified in clause 3.

3. Term

This Agreement shall commence on the start date specified in the table below and shall continue, unless terminated earlier in accordance with the terms of this Agreement, until the end date in the table below (the **Term**).

Start Date:	6 th September 2021	End Date:	11 th March 2022
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4. Data Details

- 4.1. The Brand Partner agrees to provide the Data in accordance with the terms of this Agreement.
- 4.2. The parties acknowledge that each of the parties are a Data Controller in respect of the Personal Data it processes under or in connection with this Agreement.

5. Data Transfer

- 5.1. The Data will be passed from the Brand Partner to Age UK through Box in accordance with:
- 5.1.1. Schedule B (*Report Format*) as amended or replaced from time to time;
 - 5.1.2. Schedule C (*Transfer Dates*);
 - 5.1.3. Schedule E (*Age UK Network Security Policy*) as amended or replaced from time to time;
 - 5.1.4. Schedule F (*Data Flows*); and
 - 5.1.5. Schedule G (*Box Guidance*) as amended or replaced from time to time.

6. Data Processor

- 6.1. Age UK wishes to engage the party whose details are set out below to act as its Data Processor to carry out the processing activities set out below in respect of the Data:

Name:	Box.com(UK) Ltd Anna Sun, Account manager asun@box.com
Address:	White Collar Factory 1 Old Street Yard, Floors 14-15, London EC1Y 8AF Company no. 08097316
Processing Activities:	Storage of programme-related monitoring data

Name:	Age UK's fulfilment centre in Warrington Ciara Rosney Ciara.Rosney@ageuk.org.uk
Address:	Unit 44, Hardwick Grange, Woolston, Warrington WA1 4RF
Processing Activities:	Storage of programme-related data – customer satisfaction survey recipients

- 6.2. Except where Age UK is Data Controller of data received, Age UK shall obtain the prior consent of the Brand Partner before engaging any additional Data Processors to carry out the processing activities set out below in respect of the Data.
- 6.3. Age UK will procure that any Data Processor approved in accordance with clause 6.1 or clause 6.2 will observe and perform the terms of clause 7.1 and will enter into a written Data Processing Agreement with the Data Processor.

7. Purpose of Data Sharing

- 7.1. The Data may only be used for the Purpose.
- 7.2. For the avoidance of doubt, the Purpose is **not** to:
 - 7.2.1. provide further services;
 - 7.2.2. use the Data for commercial or trading or direct fundraising activity, other than for the purpose of making grant applications, where the provisions of clause 9.7 will be followed;
 - 7.2.3. except when required by a regulator, share Data with third parties not named in this Agreement, unless there are prior contracts or agreements in place with these third parties.
- 7.3. Age UK shall not process Personal Data in a way that is incompatible with the Purpose.

8. Consent and Lawful Basis

- 8.1. The Brand Partner will ensure that there is a lawful basis for sharing the Data with Age UK.
- 8.2. Where the lawful basis for sharing Data depends upon the Brand Partner obtaining a Data Subject's consent, in order to obtain that Data Subject's consent, the Brand Partner will use the case study form set out at Schedule D, in respect of case studies, and in respect of all other Data, either:
 - 8.2.1. the Age UK consent form in schedule D; or
 - 8.2.2. its own alternative consent form containing the necessary provisions in order to obtain lawfully, consent for the data to be passed to Age UK and for the Data to be used for the Purpose;
- 8.3. The Brand Partner will maintain a record of the lawful basis enabling it to share any Data with Age UK and make available the records and any associated consent forms whenever Age UK requests this in writing within 5 working days of receiving such written request.

9. Responsibilities

Age UK Responsibilities

- 9.1. Age UK shall treat all Data as confidential and shall ensure that all employees and volunteers who have access to Data shall treat such Data as confidential.
- 9.2. Age UK shall ensure staff or volunteers processing Data are suitably trained and made aware of their responsibilities in handling the Data.
- 9.3. Except for Data Processors approved in accordance with clause 6.1 or clause 6.2 or where it is agreed that Age UK may publish the Data, Age UK will not share the Data with anyone not named in this Agreement, unless there are prior contracts or agreements in place with these third parties.
- 9.4. Age UK shall ensure that the Data is accessed, processed and used within the European Economic Area or the United Kingdom only, unless there are appropriate safeguards in relation to the transfer of the Data outside the EEA or the United Kingdom.
- 9.5. Age UK shall conduct a risk assessment for the data sharing on the Programme.
- 9.6. Age UK shall only use the Data in accordance with the Purpose.
- 9.7. Age UK shall ensure that any publication derived from the Data by any party complies with the following guidance and accountability principles set out under the GDPR: <https://ico.org.uk/media/for-organisations/documents/1061/anonymisation-code.pdf>

Brand Partner Responsibilities

- 9.8. The Brand Partner will provide corrections and updates to any Data as and when necessary, throughout the term of this Agreement.
- 9.9. The Brand Partner will ensure that any Data shared with Age UK is accurate and up to date.

10. Termination

- 10.1. Subject to the provisions of this clause 10, this Agreement shall continue for the Term.
- 10.2. Age UK may terminate this Agreement by giving no less than 1 month's written notice to the Brand Partner.
- 10.3. Either party may terminate this Agreement if:

10.3.1. the other party is in breach of this Agreement;

10.3.2. the other party is in breach of this Agreement and fails to undertake remedial action within 30 working days of receiving notice from the other party outlining the breaches which need to be remedied;

10.3.3. either party ceases to exist or begins insolvency proceedings, whether liquidation or administration.

10.4. This Agreement will terminate automatically if the Warm Home Discount Scheme Year 11 Home Energy Checks Agreement between the same parties as this agreement and dated [15/10/21] is terminated for any reason.

11. Data Protection

Both parties shall (and shall procure that any of its staff and volunteers involved in the Programme shall) comply with any notification requirements under Data Protection Laws and each party will observe all its obligations under relevant Data Protection Laws which arise in connection with the Programme and this Agreement.

12. Liability

12.1. Neither party excludes or limits liability to the other party for:

12.1.1. fraud or fraudulent misrepresentation;

12.1.2. death or personal injury caused by negligence;

12.1.3. a breach of any obligations implied by section 12 of the Sale of Goods Act 1979 or section 2 of the Supply of Goods and Services Act 1982; or

12.1.4. any matter for which it would be unlawful for the parties to exclude liability.

12.2. Subject to clause 13.1 neither party shall in any circumstances be liable whether in contract, tort (including for negligence and breach of statutory duty howsoever arising) misrepresentation (whether innocent or negligent) restitution or otherwise for:

12.2.1. any loss (whether direct or indirect) of profits, business, business opportunities, revenue, turnover, reputation or goodwill;

12.2.2. loss (whether direct or indirect) of anticipated savings or wasted expenditure (including management time); or

12.2.3. any loss or liability (whether direct or indirect) under or in relation to any other contract.

12.3. Clause 13.2 shall not prevent claims for:

12.3.1. direct financial losses that are not excluded under any of the categories set out in clause 13.2; or

12.3.2. loss of tangible property or physical damage to property.

13. Security

13.1. Each party warrants to the other that it will process the Data in compliance with all applicable laws, enactments, regulations, orders, standards and other similar instruments.

13.2. Each Party warrants that, having regard to the state of technological development and the cost of implementing any measures, it will take appropriate technical and organisational measures against the unauthorised or unlawful processing of Data and against the accidental loss or destruction of, or damage to, the Data to ensure a level of security appropriate to:

13.2.1. the harm that might result from such unauthorised or unlawful processing or accidental loss, destruction or damage; and

13.2.2. the nature of the Data to be protected.

13.3. The Brand Partner shall only provide the Data to Age UK by using secure methods as agreed and set out in clause 5.1.

13.4. It is the responsibility of each party to ensure that its staff members are appropriately trained to handle and process the Data in accordance with each party's policies and procedures together with any other applicable national Data Protection Laws and guidance.

14. Data Subjects Rights

14.1. The parties each agree to provide such assistance as is reasonably required to enable the other party to comply with requests from Data Subjects to exercise their rights under Data Protection Law within the time limits imposed by Data Protection Law.

14.2. The contact person for each party is responsible for maintaining a record of individual requests for information, the decisions made and any information that was exchanged. Records must include copies of the request for information, details of the data accessed and shared and where relevant, notes of any meeting, correspondence or phone calls relating to the request.

14.3. The contact persons for each party are:

Age UK:	Brand Partner:
Project Manager: Alisa Yingling alisa.yingling@ageuk.org.uk	Key staff member: John Hibbert Housing Manager john.hibbert@ageuknotts.org.uk

Line manager/ escalation point: Alexandra Olaseinde, Programme Manager Alexandra.olaseinde@ageuk.org.uk	Senior manager/ escalation point: Kat Coggan Strategic Director (Housing) kat.coggan@ageuknotts.org.uk
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15. Data retention and deletion

- 15.1. Age UK shall not retain or process Data for longer than is necessary to carry out the Purpose.
- 15.2. Notwithstanding clause 16.1, the parties shall continue to retain Data in accordance with any statutory or professional retention periods applicable in their respective countries and / or industry.
- 15.3. Age UK shall ensure that any Data is returned to the Brand Partner or destroyed in accordance with an agreed deletion procedure to be agreed between the parties in the following circumstances:
 - 15.3.1. on termination of this Agreement;
 - 15.3.2. on expiry of the Term of this Agreement;
 - 15.3.3. when processing of the Data is no longer necessary for the Purpose.

16. Data Protection Breach

- 16.1. The parties shall each comply with their obligation to report a Personal Data Breach to the appropriate Supervisory Authority and (where applicable) Data Subjects under Article 33 of the GDPR and shall each inform the other party of any Personal Data Breach irrespective of whether there is a requirement to notify any Supervisory Authority or Data Subject(s). Each party should be informed of such breaches immediately where possible and no later than 24 hours after the identification of such a breach.
- 16.2. The parties agree to provide reasonable assistance as is necessary to each other to facilitate the handling of any Personal Data Breach in an expeditious and compliant manner.

17. Notices

- 17.1. Any notice or other communication given to a party under, or in connection with, this Agreement shall be in writing and shall be:
 - 17.1.1. delivered by hand or by pre-paid first-class post or other next working day delivery service
 - 17.1.2. at its registered office (if a company) or its principal place of business (in any other case); or

17.1.3. sent by email to the following email address:

Age UK:	Brand Partner:
Project Manager: Alisa Yingling alisa.yingling@ageuk.org.uk	Key staff member: John Hibbert Housing Manager john.hibbert@ageuknotts.org.uk
Line manager/ escalation point: Alexandra Olaseinde, Programme Manager Alexandra.olaseinde@ageuk.org.uk	Senior manager/ escalation point: Kat Coggan Strategic Director (Housing) kat.coggan@ageuknotts.org.uk

17.2. Any notice or communication shall be deemed to have been received:

17.2.1. if delivered by hand, on signature of a delivery receipt or at the time the notice is left at the proper address;

17.2.2. if sent by pre-paid first-class post or other next working day delivery service, at 9.00 am on the second Business Day after posting or at the time recorded by the delivery service.

17.2.3. if sent by email, at 9.00 am on the next Business Day after transmission.

18. Third Party Rights

A person who is not a party to this Agreement shall not have any rights under the Contracts (Rights of Third Parties) Act 1999 to enforce any terms of this Agreement. This does not affect any right or remedy of a third party which exists, or is available, apart from that Act.

This agreement has been entered into on the date stated at the beginning of it.

Signed for and on
behalf of **Age UK**

Name: Alison Ingram
Position: Head of Wellbeing



Signed for and on behalf of
Age UK Nottingham & Nottinghamshire

Name: Di Trinder
Position: Joint Chief Executive

Schedule A: Data Specification

Data	Format	Definition	Example
MONTHLY MONITORING FORM			
Client ID number	Brand Partner initials format	The id number or initials of the person receiving the service	VH 40589
Age UK rep name	Name Surname	The name of the person delivering the service	John Smith
Date of HEC Assessment	DD/MM/YY	The date the session took place	07/11/21
How was the HEC assessment delivered?	Dropdown provided	The format of the session	Telephone
Equipment installation date	DD/MM/YY	The date the installation took place	08/11/21
Is this a 'partial' or 'full' check?	Dropdown provided	The type of the session	Full
Month assessment was completed	Dropdown provided	The month the assessment took place	November 2021
Reason for referral	Dropdown provided	The reason(s) the client was referred to the service	Difficulty with paying bills
Referral source	Dropdown provided	Who referred the client into the service	I&A

Handyperson assessment	Options provided to tick	The assessment of the property carried out by the handyperson	Home feels cold
Age	Age categories (dropdown options provided)	The age of the older person when first accessing the service	65-74
Income below £16,190	Yes/No answer	The income of the person is below/or not £16,190 at the time of the assessment	Yes
Disability	Yes/No/Prefer not to disclose	If the person assessed has a disability	Prefer not to disclose
Long term conditions	Tick appropriate box	The long-term conditions the client assessed has	Arthritis
Property assessment	Tick appropriate box	Assessment of the building's energy efficiency	No loft insulation
No of older people in the household	Number	The number of older people living in the property	2
Tenure	Tick appropriate box	The type of tenure for the property	Privately rented
Fuel poverty category	Dropdown provided	The category of fuel poverty that the client is assigned to	Over 65 and on low income

Gas supplier	Tick appropriate box	The name of supplier of energy	British Gas
Electricity supplier	Tick appropriate box	The name of supplier of energy	British Gas
Advice provided	Tick appropriate box	The type of advice provided to each household	Keep living room temperature at 21 degrees
Questions for client	Tick appropriate box	Assessment of ability to use heating system, impact of the cold on health	Very confident
Equipment	Number in appropriate box	The number of pieces of equipment installed	Light bulbs - 3
Other support provided	Tick appropriate box	Types of other support provided	Referral to I&A for WHD assessment
Signature	Yes/No answer	Ensure client has given consent and had signed the home energy check form	Yes

CASE STUDIES (only when the person gives consent to share their story)			
Name (and surname)	Free text	The name and/ or surname	Mary Berry
Age	Free text	The age of the older person	65
Location	Free text	Some identifiable information	Lives in Stockport in a bungalow
Health condition(s)	Free text	Identifiable information regarding their health	Has suffered from COPD
SATISFACTION SURVEYS (only when the person wants to be entered into a prize draw or requests to be contacted – e.g., about a complaint)			
Name and surname	Free text	The name and/ or surname	Mary Berry
Address	Free text	Full address to send the prize	65 Cherry Tree Crescent, IR3 1HR
Telephone number	Free text	Telephone number for us to contact the older person	01756 456 789
E.ON BOILER REPLACEMENT SCHEME REFERRAL FORM			
Name of applicant (including title)	Free text	The title, name and surname of person submitting a claim for Warm Home Discount	Mr John Jones
Energy supplier	Tick box	Confirmation that the client is an customer of Eon, Shell Energy, Avro Energy or Octopus Energy	✓
Applicant date of birth	Free text	The date the applicant was born.	25 th September 1945

Name of account holder (if different from name of applicant)	Free text	The name of the person that holds the account with the energy provider, if different from the applicant	Mrs Janice Jones
Address including postcode	Free text	The address and postcode of the applicant	55 Crescent Road, WC1 9TR
Telephone number (if applicable)	Free text	The phone number of the applicant	020 202 35246
Email address (if applicable)	Free text	The email address of the applicant.	johnjones@gmail.com
Benefits claimed	Multiple option	Information regarding benefits claimed in order to assess eligibility of the applicant.	Not receiving the Guaranteed Element of Pension Credit AND In receipt of the Savings Element of Pension Credit only
Referrer's name	Free text	The name of the member of staff supporting the applicant with the claim	Cheryl Johnson
Date	Free text	The date the application was written	1 st December 2018
PARTNERS' ORIGINAL ASSESSMENT DOCUMENTATION (sample to be collected as a quality assurance measure, consent must be obtained)			
Client ID number	Brand Partner initials format	The id number or initials of the person receiving the service	VH 40589

Age UK rep name	Name Surname	The name of the person delivering the service	John Smith
Date of HEC Assessment	DD/MM/YY	The date the session took place	07/11/21
How was the HEC assessment delivered?	Dropdown provided	The format of the session	Telephone
Equipment installation date	DD/MM/YY	The date the installation took place	08/11/21
Reason for referral	Dropdown provided	The reason(s) the client was referred to the service	Difficulty with paying bills
Referral source	Dropdown provided	Who referred the client into the service	I&A
Handyperson assessment	Options provided to tick	The assessment of the property carried out by the handyperson	Home feels cold
Age	Age categories (dropdown options provided)	The age of the older person when first accessing the service	65-74
Income below £16,190	Yes/No answer	The income of the person is below/or not £16,190 at the time of the assessment	Yes

Disability	Yes/No/Prefer not to disclose	If the person assessed has a disability	Prefer not to disclose
Long term conditions	Tick appropriate box	The long-term conditions the client assessed has	Arthritis
Property assessment	Tick appropriate box	Assessment of the building's energy efficiency	No loft insulation
No of older people in the household	Number	The number of older people living in the property	2
Tenure	Tick appropriate box	The type of tenure for the property	Privately rented
Fuel poverty category	Dropdown provided	The category of fuel poverty that the client is assigned to	Over 65 and on low income
Gas supplier	Tick appropriate box	The name of supplier of energy	British Gas
Electricity supplier	Tick appropriate box	The name of supplier of energy	British Gas
Advice provided	Tick appropriate box	The type of advice provided to each household	Keep living room temperature at 21 degrees
Questions for client	Tick appropriate box	Assessment of ability to use heating system, impact of the cold on health	Very confident

Equipment	Number in appropriate box	The number of pieces of equipment installed	Light bulbs - 3
Other support provided	Tick appropriate box	Types of other support provided	Referral to I&A for WHD assessment
Signature	Yes/No answer	Ensure client has given consent and had signed the home energy check form	Yes

Schedule B: Report Format

To be sent separately in Excel format.

Schedule C: Transfer Dates

Reporting schedule		
Reporting period	Report type	Deadline to send report to Age UK
Start date - 30 September 2021	Monthly	Wednesday 6 October 2021 (5pm)
1-31 October 2021	Monthly	Thursday 4 November 2021 (5pm)
1-30 November 2021	Monthly	Monday 6 December 2021 (5pm)
1-31 December 2021	Monthly + case study	Monday 10 January 2022 (5pm)
1–31 January 2022	Monthly	Monday 7 February 2022 (5pm)
1-28 February 2022	Monthly	Monday 7 March 2022 (5pm)
1-11 March 2022	Monthly + online evaluation survey	Thursday 17 March 2022 (5pm)

Schedule D: Consent Forms

Generic consent form

Use of your information

In order to carry out this service, [BRAND PARTNER NAME] will need to process information relating to your personal circumstances. The information we will need to process includes your name, address, age range, health conditions, disability, income range and details of the services you receive (“**your information**”).

Our partner organisations for this service are the national charity, Age UK, and the funders, e.on Energy, Avro Energy and Shell Energy. From time to time, we might share your information with our funders or their auditors so they can check how well we’re doing. We won’t share information with any other organisations without first obtaining your permission.

You can still receive the service and opt to not provide consent for the processing of **specific** personal information (e.g., income or health conditions) by choosing a ‘**prefer not to say**’ option. Furthermore, if you do provide this **specific** information but change your mind and would prefer us not to process this, you can get in touch with using the above contact details.

You can also get in touch to withdraw your consent to processing of **all** personal information. However, if you opt to withdraw your consent for the processing of **all** information, then this will indicate your withdrawal from the service as we need to be able to process certain information you provide, in order to support you effectively and administer the service.

☐ I give my consent for [insert brand partner name] to process my personal information for the purpose of providing advice and support for me, and administering the Home Energy Check service:

We love sharing real life examples of where we have helped older people, so would like to contact you in the next few weeks to see if you would like to take part in something like this.

☐ I give my consent to [insert brand partner name] to contact me by telephone to take part in a case study about the help I have received.

The national charity, Age UK, would like to contact you, by post, to ask for feedback on the service we’ve provided, to find out how well we did.

☐ I give my consent for [insert brand partner name] to share my name and address with the national charity, Age UK, and for Age UK to send me a FREEPOST customer satisfaction survey, in order to ask for my feedback on the service. I understand that I may withdraw my consent at any time by [insert method for withdrawing consent to processing] and quoting reference [INSERT]

Name: Date

Signature:

Case study form and consent form

Programme name – **Storyteller's name**

Local Age UK/Cymru

name here

Contact at Local Age UK/Cymru

name here

Keywords

list any keywords which are relevant to this story, separated by commas

Overview

<Give a brief overview of the story. This should be no more than 300 words.>

Notes

<Anything that people might need to be aware of when using this story?>

Story

Name: full name

Age: XX

Services used: list of services here

A bit about the storyteller

<Give as much information as you can about the storyteller here. Cover things like age, location, occupation, who they live with, their general wellbeing, personality etc>

A summary of their experiences

<Sum up some of the issues they've been facing here and how it has been affecting them. Add as much information as you can and use direct quotes wherever possible>

Involvement in the project

<Sum up some of the experiences they have had and how they came to be involved in the project. Add as much information as you can and use direct quotes wherever possible>

How Age UK/Cymru has supported them

<Give a good overview of how Age UK has supported the storyteller. How did they find us? What support did they access? Any standout moments in the support? Add as much information as you can and use direct quotes wherever possible>

What this support has meant for them

<Explain any outcomes for the storyteller here. Has their issue resolved? Are things better now? Also include any feedback the storyteller has of the support they've received from us. Add as much information as you can and use direct quotes wherever possible>

All case studies must have signed consent from the person who is sharing their story, whether they are named or not. The person should read the case study and then complete and sign the consent form.

Thank you very much for agreeing to share your story with Age UK (registered charity number 1128267) and [Local Age UK / Cymru name and charity number]. Whenever this form says "we" or "us" it means both organisations. By doing this, you're supporting the vital work that we do for people in later life.

This consent form lets you tell us **how** we can use your story. We'll always share and store your information confidentially and securely, and we'll give you a copy of this consent form.

Section 1: How would you like to be known when we use your story?

Tick **one box** only from these three options:

☐ Use my **full name** (your title, first name and surname) in the story.

☐ Only use my **first name** in the story.

☐ Use a made-up name because I prefer to remain **anonymous**.

Section 2: How do you want us to share your story?

Please tick one box each for questions (a) to (d) below. If you don't tick a box for the questions below then we'll assume you do **not** want us to use your story in that way. For each question, if you have chosen to remain anonymous, we'll only share your story, not your name.

(a) Are you happy for Age UK to share your story with organisations working for us on this project or funding the project? This will help Age UK produce reports that show the difference the project has made to people like you who have experienced it. For this project, these other organisations are:

FUNDER NAME, the funder of the project, who we regularly report to on the progress of the project and the difference it's made.

☐ Yes, I'm happy for you to share my story with this organisation.

☐ No, please don't share my story with this organisation.

(b) Are you happy for us to use your story in fundraising materials? These would be used to raise money for us to enable us to continue help older people.

☐ Yes, I'm happy for Age UK and **[Local Age UK / Cymru name]** to use my story in fundraising materials.

☐ No, please don't use my story in this way.

(c) Are you happy for us to use your story to help with our campaigning and policy work? Case studies are very useful when we try to explain to decision makers like local or national government about the issues that older people face.

☐ Yes, I'm happy for Age UK and [Local Age UK / Cymru name] to use my story in this way.

☐ No, please do not use my story in this way.

(d) Are you happy for us to share your story with the media?

This means sharing your story with journalists and other people in the media who may use it or refer to it in local or national newspaper articles, on radio stations or on TV. We may also use it on Age UK or [Local Age UK / Cymru name]'s website or on social media (including Facebook, LinkedIn or Twitter). If you've chosen to remain anonymous, we'll only share your story, not your name. If parts of your story could identify you, we'll remove these.

☐ Yes, I'm happy for Age UK and [Local Age UK / Cymru name] to share my story with the media and **do** want to be contacted to discuss the details of my story further.

☐ Yes, I'm happy for Age UK and [Local Age UK / Cymru name] to share my story with the media but I do **not** want to be contacted to discuss the details of my story further.

☐ No, please do not use my story in this way.

Section 3: Your options after you've shared your story with us

We may use your story as it is on the case study form, or reasonably edit or alter it.

We may use your story for up to **two years** from the date of your signature below. After this date, we will confidentially and securely destroy it unless you sign a new consent form.

You can **withdraw your consent** for us to use your story **at any time** by contacting [Local Age UK / Cymru name] and by calling the project manager for [INSERT PROJECT NAME HERE ONCE DECIDED] project manager [XXXX]. If you can't get through to [XXXX], you should call our national helpline on 0800 169 8787, quoting the name of the project for more help.

Section 4: Your details and signature

Please sign and date below so we have your permission to use your story. We also need your contact details in case we need to get in touch about using your story or identify you if you want to withdraw your consent. We'll store your details securely and confidentially on our database and we won't use these details for anything else, including direct marketing.

Signature

I confirm that I am at least 18 years old, understand the content of this consent form and can sign it without the permission or knowledge of any other person.

Client signature: _____ Date signed: ____ / ____ / ____

Name: _____

Address: _____

Postcode: _____ Telephone: _____

Email address: _____

Verbal consent (if required – i.e. obtained over the telephone):

Please read the below statement to the client and make note of date and time they have agreed to it:

I confirm that I am at least 18 years old, understand the content of this consent form and agree for my story to be shared as agreed within the form. I understand Age UK and [NAME OF BRAND PARTNER] need my contact details in case they need to get in touch with me about using my story or identify me if I want to withdraw my consent. I also understand that Age UK and [NAME OF BRAND PARTNER] will store my details securely and confidentially, and that they won't use these details for anything else, including direct marketing.

The individual provided consent to the above statement on:

Date: _____ Time: _____

Name of call handler noting the person's consent: _____

Role of call handler within organisation (e.g. I&A advisor): _____

Home energy checks script – for telephone sessions only

In order to carry out this home energy check over the phone, we'll need some information from you. This includes your name, address, age range, gender, ethnicity, health conditions, disability, details about your income and any services you receive. You can choose not to share some of this information, except name, address and age.

- Are you happy to provide this information and for me to proceed with providing you with advice and support relating to the Home Energy Check service?

Yes, the client is happy [Continue.]

No, the client is **not** happy to continue [Do **not** continue.]

If they are happy to continue:

Great, thank you. I'm just going to run through a few more details before we start.

Just to let you know, we are running this project alongside the national Age UK charity, as well as the funder of the project, [NAME OF FUNDER]. So we can evaluate the success of our work, we will share some of your information with the national Age UK and [NAME OF FUNDER]. Don't worry though, we won't share any information which can identify you – like your name or address – without your permission first.

- Is it ok for us to share information that doesn't identify you?

Yes, the client is happy [Continue.]

No, the client is **not** happy to continue [Do **not** continue – you should explain to the individual that unfortunately they wouldn't be able to receive this service without the sharing of non-identifiable data.]

If they are happy to continue:

Great, we'll move onto the home energy check now.

[Run through the home energy check and revert back to this script after completed].

Just a few more questions now.

We love sharing real life examples of where we've helped older people.

- Would it be ok for someone from **[NAME OF PARTNER]** to contact you in the next few weeks to see if you'd like to take part in something like this?

Yes, the client is happy [Continue.]

No, the client is **not** happy to be contacted [Continue.]

Age UK national would also like to contact you by post to ask for feedback on the service we've provided today, so they can see how well we did.

- Can we share your name and address with Age UK national so they can send you a satisfaction survey? Please be assured that Age UK won't use your information for anything else, such as marketing information.

Yes, the client is happy [Continue.]

No, the client is **not** happy to share [Continue.]

- Would you like me to give you a contact name and number in case you have any other questions?

Yes **[provide name and number at local partner]**

No [continue]

You can also find more information in our privacy policy, which you can find on our website, or I can read you the link to this?

[insert brand partner hyperlink to privacy policy]

End

Client name:

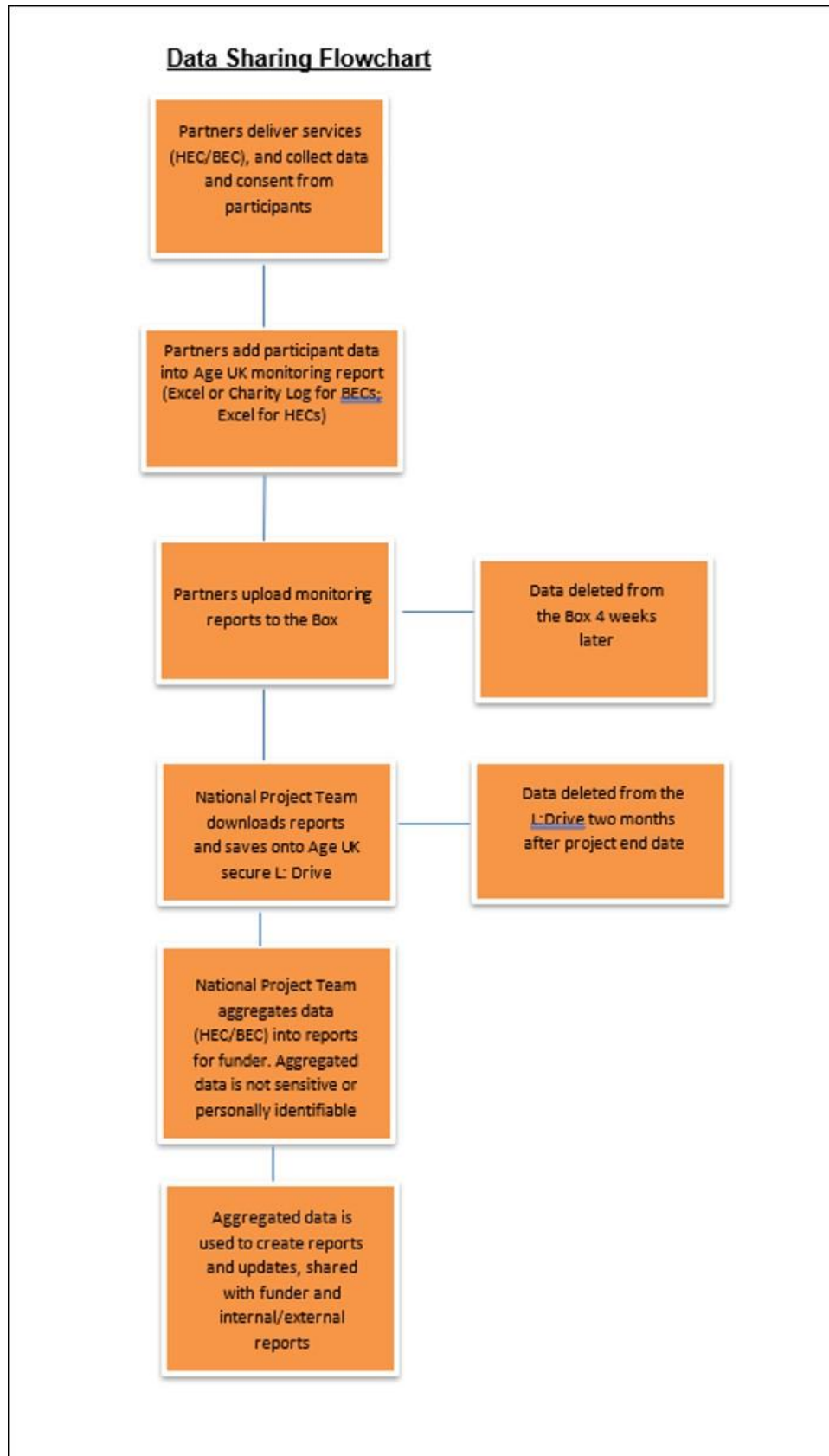
Date:

Handyperson's name:

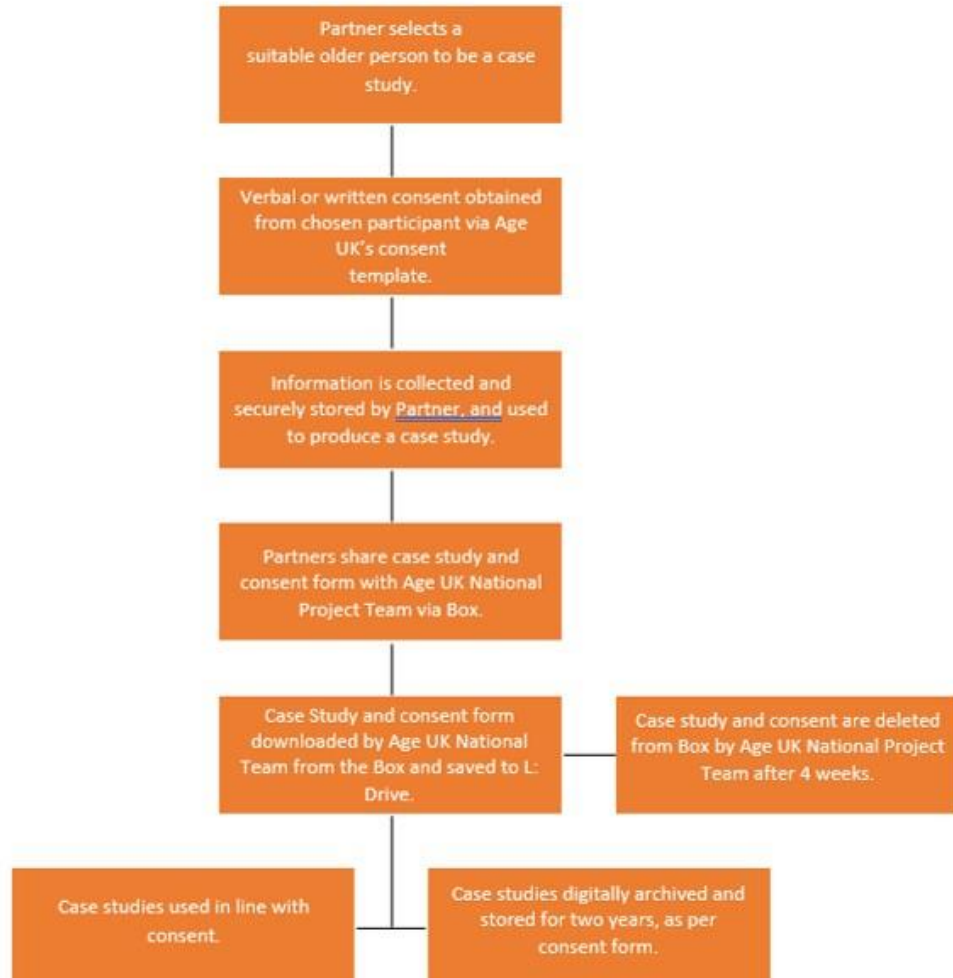
Schedule E: Age UK Network Security Policy

Available at: <https://app.box.com/folder/145155626715>

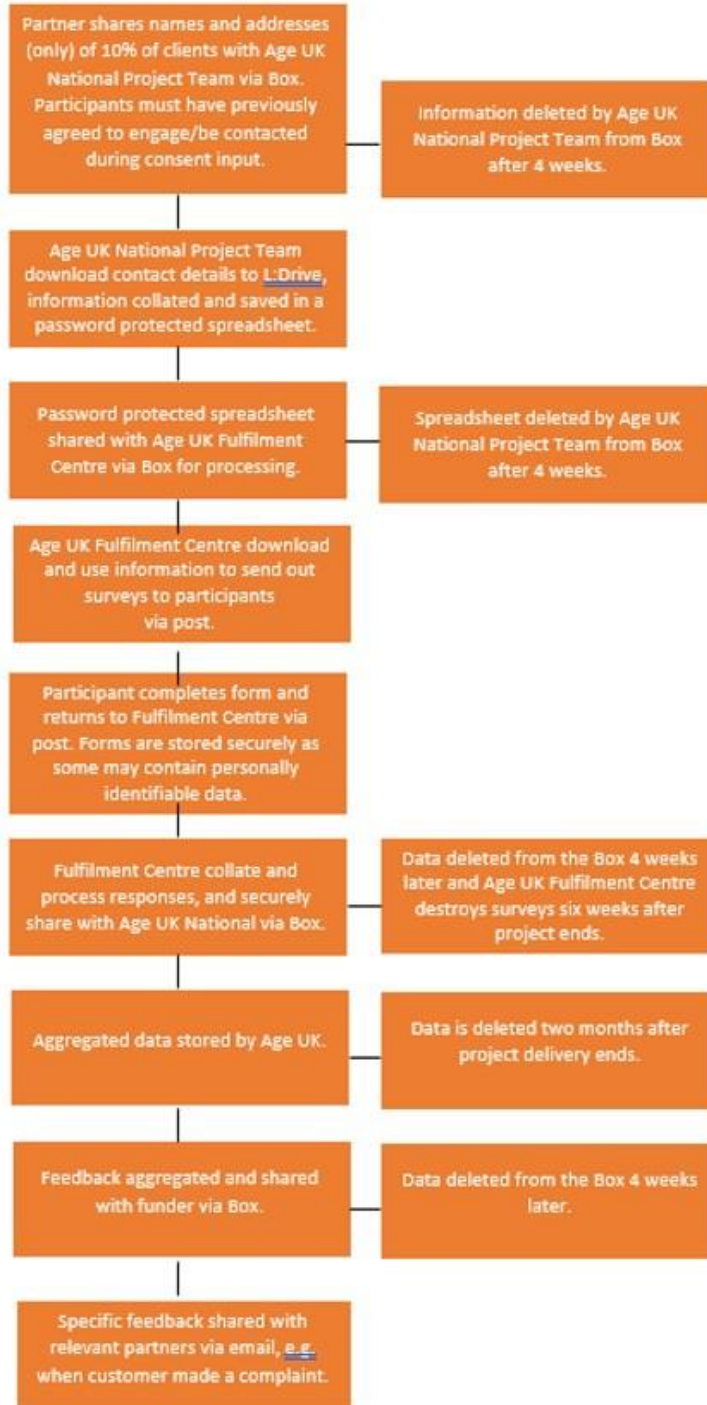
Schedule F: Data Flows



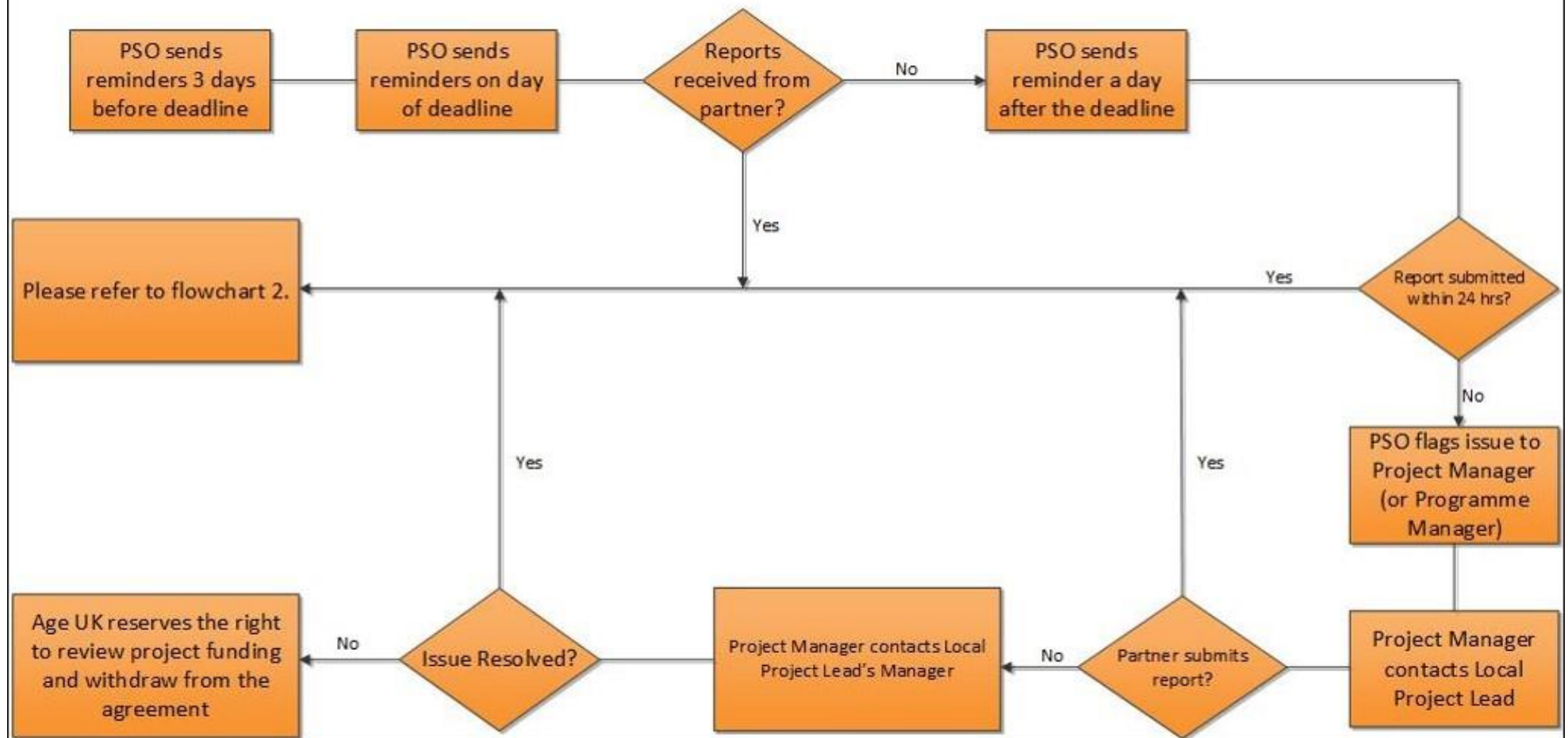
Case Studies



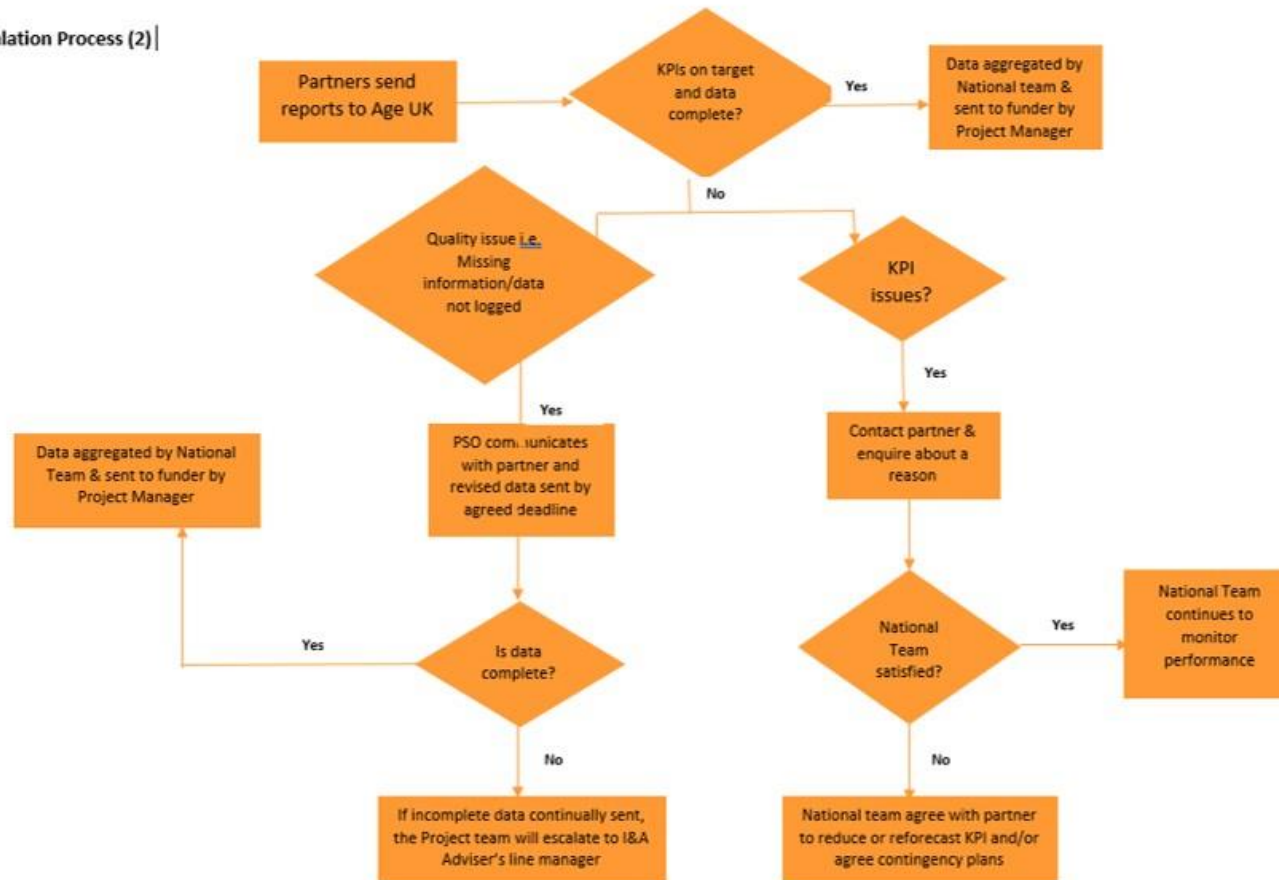
Customer Satisfaction Survey



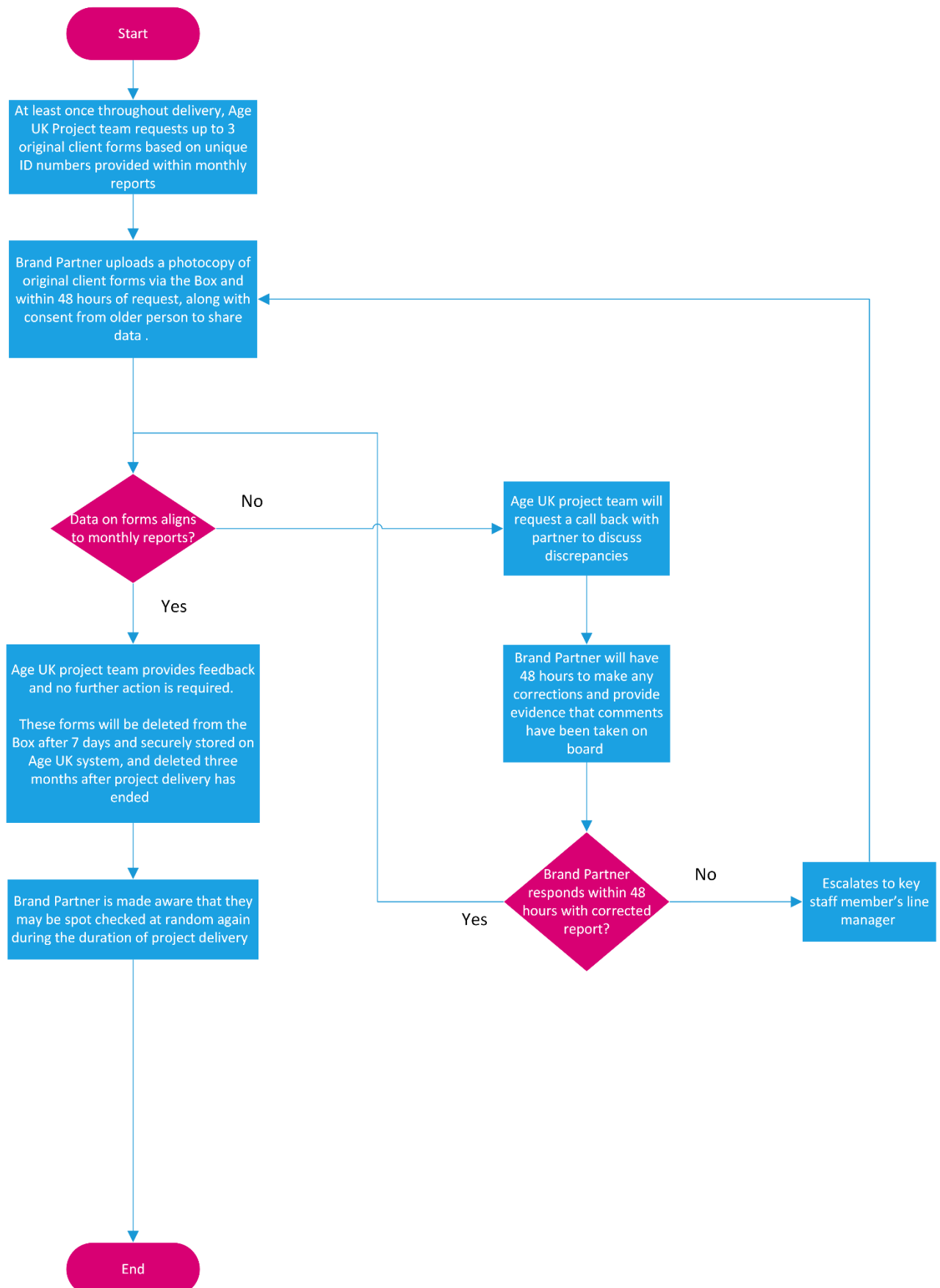
Escalation Process



Escalation Process (2)



Local partner spot checks process flowchart



Schedule G: Box guidance

Available at: <https://app.box.com/folder/144016987056>