AGE UK YORK GUIDELINES
(POLICIES AND PROCEDURES)

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A. CHARTER OF RIGHTS FOR THOSE WHO USE OUR SERVICES

AGE UK YORK exists in order to serve the older people of York and district. We aim to ensure to those who use our services the following rights.

1. Service will be delivered according to essential values:
   - the right of the users to stay at home as long as this may be practical and desired
   - the right of users and their carers to be fully consulted about the way in which needs are to be met
   - the right of the users to take risks
   - the right of the users to maintain their chosen lifestyle
   - the right of the users to have an advocate or representative

2. The way in which the service is provided will meet the needs of the user:
   - the service will be reliable.
   - the service should be provided by the same unpaid helper or staff member as far as possible.
   - the way in which service is provided will respect the privacy and dignity of the user.
   - users will have the right to withdraw from a service agreement.
   - the user or volunteer will not be discriminated against on the grounds of race, nationality, language, religion or beliefs, gender, sexual orientation or social standing.

3. The user will have as much control as possible in the management of their service.
   (Refer to user involvement policy.)
   - each user will be informed in advance about the services to be provided.
   - the user will agree to the service provided and be consulted and informed in advance about service changes.
   - the user’s personal information will be treated as strictly confidential.
   - the security of the user’s personal possessions and money will be respected.
   - the user will be informed how to make a complaint about services, and will receive a prompt response to any expressed dissatisfaction with them.
   - the user will be enabled to express views about how the services should be changed and developed.

4. Service users should:
   - treat volunteers with courtesy and respect;
   - ensure that their home does not represent a safety hazard for the volunteer and that their domestic equipment is well maintained; (AGE UK YORK has a comprehensive Health & Safety policy available for users to read, if they wish.)
   - take steps wherever possible to protect and insure their own property and personal effects from damage or loss.

Reviewed April 2012
B. CHARTER OF RIGHTS FOR VOLUNTEERS

AGE UK YORK exists in order to serve the older people of York and District.

This Charter specifies the commitments which we ask of all our volunteers and what they should expect from us in return.

AGE UK YORK has adopted a statement of the principles we seek to apply in our work with older people. These principles should underpin all that you do whilst working with the organisation.

All older people are entitled to the help that they need to improve their own sense of well-being and to have control of their own lives. An older person, whether able-bodied or with some disability, has the right to a life which retains respect for him or her as an individual, maintains independence, and which:

- safeguards privacy and promotes dignity
- offers genuine and informed choices
- encourages the formation and continuation of friendships
- gives the chance to develop new skills and knowledge
- meets his or her social, cultural and individual needs

If you have any queries about the implications of these principles for your area of work, please discuss them with your Service Manager.

Reviewed April 2012
C. VOLUNTEERING POLICY

Section 1: General Policy on the Use of Volunteers

1.1 Statement of Purpose

AGE UK YORK exists to promote the well-being of all older people in the City of York and surrounding area, recognising their right to independence, fulfilment, dignity and choice, working with them to help make later life a fulfilling and enjoyable experience. We seek to achieve these ends through direct service provision, campaigning, public education and advocacy, research and consultation, and working in partnership.

Volunteers play a key role in our work because:

1. Our commitment to working in partnership is enhanced by involving the widest possible range of people in our activities. Volunteers who are working with us and share our values and aims will help to promote awareness of the needs and concerns of older people, broadening our social advocacy and public education.

2. The quality of life of most older people is enhanced by their membership of, and involvement with, the community. By creating opportunities for people to volunteer, we play an important role in building and strengthening communities.

3. Using volunteers brings a wider range of skills and experience to the tasks we undertake.

4. We recognise that there will never be sufficient resources to meet all the needs of older people within York through paid services.

This policy describes the policies we have adopted for recruiting, supporting and utilising volunteers in the work of AGE UK YORK.

1.2 Aims

1.2.1 In principle, we will involve volunteers in any area of the organisation's work where we are not prevented by legislation.

1.2.2 We are therefore committed to seeking to recruit a range of volunteers who represent the wider community and can offer a wide range of skills and experiences.

1.2.3 This document describes the general procedures for recruiting, placing and supporting volunteers. More detailed guidelines covering specific areas of work will be produced where necessary,
1.2.4 AGE UK YORK is committed to the provision of a service to local people regardless of race, gender, age, religion, sexuality or disability. Volunteer Involvement reflects and works within this policy.

1.2.5 Volunteers may be involved in all programmes and activities, and serve at all levels of skill and decision-making. Volunteers should not be used to displace any paid employee from their positions.

This policy statement is concerned with those volunteers who work without a wage for the benefit of others within AGE UK YORK and under the general supervision of AGE UK YORK staff. Where we place volunteers with groups working with older people, we would seek to ensure that the same standards and policies apply, but recognise that these groups may have less formal structures. Under those circumstances, we will make clear to the volunteers the nature of their relationship with that group and may continue to offer additional support to them by agreement.

This policy statement exists:

- to ensure that our staff take account of the contribution of volunteers in planning our services and activities.
- to give clear guidance to staff and others on the use of volunteers.
- to help maintain professional standards and to standardise good practice.
- to ensure that volunteers are welcomed, valued and placed appropriately.
- to ensure that volunteers receive appropriate training, preparation, support and supervision.
- to ensure that volunteers reflect the ethnic and cultural make up of the community and are recruited in accordance with the AGE UK YORK policy on equal opportunities.

These general principles under-pin the use of volunteers within AGE UK YORK. We will monitor the changing role and use of volunteers carefully. We will oppose proposals which specifically encourage the use of volunteers to displace paid staff, whether within our own or another organisation.

1.3 The Status of Volunteers

A ‘volunteer’ is anyone who performs a task at the direction of, or on behalf of, AGE UK YORK, without a wage other than the reimbursement of appropriate expenses or out of pocket costs incurred. A ‘volunteer’ must be recognised and registered with us before performing any task. Although in terms of policy and practice, we seek to make no distinction between our paid and unpaid workers, volunteers are not to be considered as employees of the organisation for legal purposes other than as provided for under the organisation's insurance policies.

We will accept as “special case” volunteers people taking part in student community service activities, school/university/college placements, people on appropriate training and employment schemes, and other referral schemes. We will also accept volunteers registered with the local Volunteer Bureau to work with us. In each case, we would
expect an agreement to be in place between ourselves and the relevant agency which will clarify responsibilities for management and care of the volunteers.

The service of volunteers is accepted at the discretion of the organisation. Subject to our disciplinary and grievance procedures, we may at any time decide to terminate a volunteering relationship with the organisation. Equally, we recognise that the volunteers may also decide to sever their relationship with us at any time. Notice of such a decision should be given to their service organiser as early as possible.

1.4 Users’ Rights

AGE UK YORK has adopted a clear set of principles about the rights of older people who receive our services. These principles are expected to be respected by all our workers, whether paid or volunteer. The principles are strengthened by a number of policies, including our equal opportunities policy, confidentiality policy, and complaints procedure. All volunteers will be made aware of these policies during induction.

1.5 Volunteers Charter

The enclosed "volunteers charter" sets out specifically what our volunteers can expect from us and what we ask of them in return. It will be issued to all volunteers when they commence their work with AGE UK YORK. The key principles covered by the charter are set out below.

Volunteers have a right to expect the following:-

- To be treated alike with dignity and respect, regardless of gender, age, race, sexuality, religion or disability.
- To refuse a particular role or task without criticism, even though alternative roles or tasks may not always be available.
- To have adequate information about the organisation or individual they are assisting.
- To have information about particular roles or tasks which they are asked to undertake.
- To participate in discussions and decisions which directly affect clients with whom they are involved, given the agreement of the clients concerned.
- To be adequately insured.
- To receive reasonable expenses when engaged in voluntary work on behalf of AGE UK YORK
- To have the opportunity to gain personal satisfaction and to enhance personal development through the fulfilment, as far as possible, of their needs.
- To have access to appropriate support and supervision.
- To have the benefit of protection by AGE UK YORK's Health and Safety policy.
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- To have access to appropriate training when required.
- To have personal information respected as confidential.
- To be given a written agreement outlining the agreed role (where necessary) and the volunteer's charter outlining their rights.

1.6 Rights of AGE UK YORK

AGE UK YORK has the right to certain expectations of those people who undertake volunteering. These include:-

- Reliability, particularly with regard to appointments with clients.
- Regular communication between volunteer and AGE UK YORK service organiser.
- Commitment to the task.
- Honesty.
- Respect for rights of individuals, and for the principles of service provision adopted by AGE UK YORK.
- Confidentiality, particularly with regard to information of a private and personal nature concerning those visited by the volunteer.
- An acceptance that volunteers are accountable to AGE UK YORK in the task they have agreed to do.
- That a written agreement will be drawn up by AGE UK YORK with the volunteer, outlining the work, the role and the expectations and signed by both parties.
- AGE UK YORK also has the right to withdraw a volunteer from any specific situation, where this is deemed by AGE UK YORK to be necessary.

1.7 Training

We offer appropriate training to all volunteers - firstly, to ensure that the service we offer meets the necessary legal and professional standards; secondly, to seek to exceed the minimum standards and offer the best possible service; and thirdly, to enhance the standing of the services we offer in the opinion of both the clients and other agencies we work with.

Training is on offer to all volunteers. All volunteers attend an induction training session prior to beginning their voluntary work. Training also increases the volunteer's self awareness and helps her/him to understand their own attitudes and make better use of their previous life experiences when helping others. Training increases self-confidence, improves skills and increases knowledge in particular areas.
Training also offers volunteers the opportunity to meet with other volunteers, thus reducing their isolation, which in turn increases their identity with the group and with the agency. It enables and encourages sharing of experiences and legitimises learning from each other. For many volunteers, training is one of the rewards of volunteering.

For some volunteer roles, certain training may be mandatory before the volunteer is allowed to participate fully within the service. These areas will be clearly identified in discussing possible placements and roles with actual and potential volunteers.

1.8 Insurance

AGE UK YORK holds appropriate insurance, which is applicable to all approved and registered volunteers carrying out voluntary work agreed in advance with the volunteer organisers. This insurance covers public liability, personal accident and personal loss or damage. In order to benefit from the insurance cover available, the volunteer must observe the rules and safety policies of AGE UK YORK. Our insurance includes limited cover for loss or damage to volunteer's personal property, so long as due care has been taken.

Volunteer drivers are responsible for ensuring that their motor vehicles have appropriate insurance cover. AGE UK YORK has a policy which will indemnify volunteers for any excess payments and for loss of no claims discount for any claim arising in the course of their work with us. We will check the insurance policy and driving licence before volunteers use their cars on AGE UK YORK business.

1.9 Supervision and Support

Supervision will be offered to all volunteers, on a mutually agreed basis. Effective supervision and support is essential in order to retain volunteers, maintain their interests and level of job satisfaction and ensure that a high quality of work is carried out.

The level of frequency of supervision will depend on the nature of the work and on the volunteer's own needs, but individual sessions should be arranged for volunteers in a way which meets their needs and is acceptable to them.

In addition to supervision, it is desirable that volunteers are given the opportunity to meet together regularly for support. Support groups for volunteers can be arranged by service organisers.

1.10 Expenses

AGE UK YORK will pay reasonable expenses, agreed in advance, incurred whilst undertaking voluntary risks. Car mileage or a cycle allowance are payable (current rates can be obtained from AGE UK YORK) or, where car mileage is not appropriate, bus fares can be reimbursed. Volunteers travelling expenses are normally paid from the volunteers’ home base, during their voluntary work and return to the home base. Reasonable 'out of pocket' expenses (and In Safe Hands expenses), again agreed in
advance with AGE UK YORK, may also be reimbursed. Volunteers must be registered with AGE UK YORK and fully approved before they may claim expenses.

1.11 Health and Safety

AGE UK YORK has a responsibility for the health, safety and welfare of their employees and volunteers. No volunteer should be placed in a situation where there is an obvious risk of infection or personal injury. There is an organisation-wide Health and Safety policy which is available to all volunteers.

1.12 Service Users Finances and Gifts

It is our policy that volunteers should not become involved in the management or supervision of the financial affairs of an older person. Any such activity would not be covered by the insurance of AGE UK YORK and could lead to dismissal as a volunteer.

The organisation has a set of guidelines on the receipt of gifts from service users. These must be adhered to by volunteers.

Section 2: Using volunteers - Guidelines for AGE UK YORK staff

2.1 Introduction

These guidelines are designed to protect both our service users and volunteers and to ensure that the volunteer's role is appropriate. It is intended that these guidelines will help our staff use volunteers creatively. They are not intended to be restrictive. There is a need for flexibility in order to meet the needs of individual volunteers and individual clients. It is vital to identify and recognise the skills and experience that a volunteer has when agreeing the role for that volunteer. It may be advantageous in terms of the volunteer's personal development for new skills and experiences to be developed.

All volunteers must be registered with AGE UK YORK.

Appropriate roles/tasks must be identified, agreed and recorded between staff, volunteers and clients, if appropriate, at the outset. This will take the form of a written agreement and will be reviewed at regular intervals. It may be amended according to changes in circumstances, e.g.

- as the relationship develops and / or
- as the volunteer's skills and confidence increase, by which time a different and / or extended role may become possible.
- Whatever the role for the individual volunteer, appropriate supervision, support and training must be offered. Supervision should, where possible, be offered by a named member of staff with responsibility for the volunteer's work. Supervision
should take the form of regular contact meetings between volunteer and organiser. During these meetings, the organiser and volunteer should discuss all the work being done by the volunteer, in order to provide advice, support and encouragement and to identify any problem areas. Training needs may also be identified and communicated to the organiser so that appropriate training can be provided.

- Volunteers are covered by AGE UK YORK Insurance and can claim expenses for all voluntary work which has been agreed with AGE UK YORK in advance. Additional duties, one-off roles (e.g. trips and outings with clients) must be agreed in advance with AGE UK YORK. Failure to do this could result in the volunteer being unprotected by insurance and unable to claim expenses.

- Volunteers must abide by the principles and policies of AGE UK YORK. It is particularly important to ensure that they are aware of their rights and responsibilities in terms of health and safety.

### 2.2 Appropriate and inappropriate tasks for volunteers

Whilst we are committed to offering the widest possible range of opportunities for volunteers, AGE UK YORK is concerned to protect volunteers from inappropriate tasks. There are some areas which are clearly appropriate, and where we are positively seeking volunteers. There are other areas where we would not currently seek to place volunteers, due to the nature of the task or because it could be used to undermine the responsibilities and duties of statutory agencies. AGE UK YORK will endeavour to utilise the wide-ranging skills and experience its volunteers offer, in order to encourage motivation and creativity where appropriate.

#### 2.2.1 Appropriate roles and tasks

- Befriending individuals, whether in the community or in a residential establishment, and engaging in appropriate activities with them.

- Driving tasks which are not normally done by escort, ambulance or social workers / social workers’ aides.

- Skill sharing to help a person to develop skills, e.g. shopping with someone, using a bus etc.

- Group work, e.g. with luncheon clubs or activity centres.

- In residential and day care establishments, primarily in a social sole, befriending individuals or small groups.

- Advocacy and independent representation of people, on a formal or informal basis.

- Shop work, including sorting, cleaning and ironing stock, window displays, sales, and related duties.

- Basic clerical and reception duties.

- Provision of AGE UK YORK insurance services within the overall direction of the organisation's insurance guidelines.
• Participating in fund-raising and promotional activities.
• Carrying out practical tasks to support older people, which fall outside the scope of normal home care provision, e.g. minor repairs etc.
• Providing life-style information under the guidance of a Service Organiser (unless part of an agreed service user / volunteer contract drawn up in conjunction with the AGE UK YORK Service Organiser).

2.2.2 Inappropriate roles and tasks

• Tasks which should clearly be done by paid staff, e.g. home care assistants, social workers, social worker' aides, residential and day care staff, ambulance drivers etc, even if those staff are not available.
• Lifting or toileting, except in circumstances where training has been given, where it is not replacing work done by paid staff, and where both the volunteer and AGE UK YORK have agreed that this activity is appropriate and acceptable.
• It is not appropriate for a volunteer to become involved in managing or supervising the financial affairs of an individual.
• It is not appropriate for a volunteer to be looking after the pet of an older person unless by special arrangement with the Service Organiser, or in the event of an emergency.

Section 3: Volunteer Supervision Statement and Procedure

3. 1 Introduction

This statement and procedure describes the principles adopted by AGE UK YORK to ensure that all volunteers receive appropriate support and supervision, respecting their own time constraints and commitments.

3.2 Procedure

All volunteers will be made aware of the structure of the AGE UK YORK organisation, their places and responsibilities within the organisation, and the named person to whom they report and receive support and supervision.

All volunteers will receive appropriate individual or group support and supervision according to the service area in which they work. This support may either be on a formal or informal basis and will be provided by their Service Organiser.

• Formal: a pre-arranged session, either during the day or in the evening, as regularly as agreed at the time of the volunteer commencing with AGE UK YORK
• Informal: access to their Service Organiser to discuss urgent/pressing issues on a regular basis by telephone or in person.
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In the absence of annual leave of the Service Organiser, they will name the person from whom the volunteer will receive support or advice, should it be required.

Any conflict or disputes which cannot be resolved between a volunteer and their Service Organiser should be taken to, and discussed in private with, a senior member of staff.

The disciplinary/grievance procedure may be referred to in the event of any serious disputes or conflicts.

Section 4: Staff / Volunteer Training and Development Policy Statement

4.1 Introduction

This policy describes the commitment made by AGE UK YORK to ensure that individuals have the opportunity to be involved in training and development. This is to ensure competencies are acquired to meet the duties and responsibilities of staff and volunteers.

This policy will apply to all staff and volunteers of AGE UK YORK.

4.2 Statement of Principles

AGE UK YORK is committed to creating a culture which supports continuing development of staff and volunteers throughout their time with the organisation by:

- investing in training and development to continually improve the quality of services and for the retention of quality employees and volunteers;
- a continuous process of reviewing training and development needs against organisational and individual performance requirements;
- providing a supportive environment and learning opportunities to encourage individuals to maximise their job related skills and competencies and realise their potential in a fair and equal manner.

AGE UK YORK is committed to following the principles of:

- making a commitment to develop staff and volunteers to achieve the aims and objectives of the organisation;
- regularly reviewing and planning to meet the training and development needs of staff and volunteers;
- taking action to train and develop individuals upon recruitment and throughout their time with the organisation;
- evaluating training and development to assess achievement and improve future effectiveness.
Section 5: Volunteers Training and Development Procedure

5.1 Introduction

This procedure describes the process to be taken as a means to develop volunteers, to ensure that they have the skills, knowledge and abilities to undertake their work with AGE UK YORK.

5.2 Procedure

5.2.1 Induction training will commence with an initial session for all new volunteers (alongside paid staff members). The training session will provide the necessary information and awareness of the organisation and their role within it.

5.2.2 Further, more specific induction training will take place within the service area to which the volunteer is attached and will include service and client specific information.

5.2.3 Training sessions will be provided where appropriate and will include:

- Health and Safety
- Handling and Moving
- First Aid
- Food Handling

5.2.4 Managers / Organisers will review overall and individual volunteer training and development needs on an ongoing and regular basis.

5.2.5 Service Organisers will liaise with each other and senior management to identify and determine which needs can be met organisationally. Training sessions will be planned annually and delivered quarterly and made available to all volunteers. Sessions will be offered at varying times of the day and at different venues to ensure accessibility.

5.2.6 Evaluation of training activities, against objectives, will be made.

5.3 Additional

5.3.1 AGE UK YORK will make every effort to provide resources for training and development to support the achievement of its organisational aims and objectives, recognising where possible the personal development needs and objectives of individuals.

5.3.2 Advice and guidance on training and development issues will be made available from external sources if required.

REVIEWED APRIL 2012
D. INVOLVING OLDER PEOPLE POLICY

**Mission Statement:** AGE UK YORK promotes the well-being of all older people and aims to make life a fulfilling and enjoyable experience.

**Introduction**

AGE UK YORK is committed to the principle of User Involvement. This means that Service Users are at the heart of AGE UK YORK content and delivery of services. Users are involved in the planning and delivery of all the services and activities of AGE UK YORK.

This policy aims to build and develop a consistent approach to positive user participation throughout the different areas within AGE UK YORK. Genuine user-sensitive services are focussed on a value shared by all volunteers and staff that users deserve recognition and have a right to influence the way that support and services are provided, and to help identify the direction of AGE UK YORK.

**Definition**

The term "user" includes the following people:

- People who use AGE UK YORK services
- People who may use AGE UK YORK services in the future
- Groups and organisations who support and represent the interests of people using the services.

**Policy Objectives**

- To be committed to users' involvement, enabling them to play an active and valuable role in planning, reviewing and developing AGE UK YORK services.
- To develop user participation across all AGE UK YORK services so that user participation is meaningful and beneficial to all parties.
- To develop partnerships between volunteers, staff and users of AGE UK YORK.
- To gather and distribute feedback of users views about AGE UK YORK services.
- To measure and review progress.

The Board of Management at the highest level gives full backing to this policy and will support those who endeavour to carry it out.

5. Prime responsibility for all the implementation, monitoring and review of user policy and issues lies with the Chief Officer of AGE UK YORK.

6. Age UK York’s Commitment to users is to:

- provide a service which is friendly, helpful, confidential and responsive to needs
- to give information about the range of service provided, communicating this appropriately
- be courteous, respectful professional, flexible, honest and helpful
• listen attentively to users in order to respond to and provide the service, advice and information which users need and value.
• invite feedback from users about the services offered by AUKY so that informed decisions can be made on policies, procedures and the improvement of service quality to users
• be fair and just with people
• provide relevant, accurate and up-to-date information when users need it
• be clear with users about the level of participation and consultation, how their views will be used and, where applicable, when they will be informed of the results
• train and develop volunteers and staff so that they can provide a quality service
• monitor our performance for key areas of our services
• keep you informed of any changes in our service
• ensure AUKY is user-friendly and accessible to users.

7. There are limits to user participation: Whilst users of AUKY have a right to state their views, to enjoy choice and control and to share in the decision making about AUKY, yet there are limits to this right, such as in the adherence of legal duties and responsibilities. Where such is the case, AUKY will clearly give an explanation of actions and/or decisions together with users’ right to appeal or make a complaint.

8. Current examples of User Involvement.

   Board membership
   Recruitment of staff and volunteers
   Service design
   Management of services
   Policy development
   Strategic planning
   Service monitoring
   Personal service planning
   Volunteering
   Campaigning
   Fundraising
   Local Partnerships
   Income generation

AGE UK YORK is a strategic partner of the York Older People’s Assembly and Older Citizens Advocacy York.

REVIEWED APRIL 2012
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E. HEALTH AND SAFETY POLICY STATEMENT

AGE UK YORK staff and volunteers may, in the course of their work, face risks to their personal safety. The more contact a volunteer or staff member has with the general public, the higher are the chances of encountering such risks. Therefore, everyone working for or on behalf of AGE UK YORK - Trustees, staff and volunteers - need to be aware of risks and take appropriate action to remove, avoid or reduce them as far as is reasonably practicable.

AGE UK YORK general duty

AGE UK YORK has, as an employer, a legal duty under the Health & Safety at Work Act (1974) to ensure as far as is reasonably practicable, the health, safety and welfare at work of all employees and others who work within and from the Charity's premises.

The duties of every employee and volunteer

Every employee and volunteer, whilst working for or on behalf of AGE UK YORK, has a duty to take reasonable care for the health and safety of him/herself and other persons. In the interest of health, safety or welfare he/she must not misuse any equipment, material or facilities provided or undertake any task beyond their physical capability, knowledge or training. Where risks are identified, appropriate action should be taken to avoid, reduce or remove such risks. Identified risks must be reported without delay to Service Organisers/Managers, who will where necessary seek advice from the Health & Safety Officer.

How the policy is carried out

The Health & Safety Officer, James Player, is responsible to the Chief Officer for ensuring the charity's policy is carried out.

The AGE UK YORK Board of Trustees oversees and reviews the Health & Safety Policy.

Indemnity

AGE UK YORK, whilst recognising that there are no extra legal duties on an employee because of his or her position as a Health and Safety Officer, hereby agrees to indemnify him/her in respect of any claims made against them for liability, loss or expense which arises from their actions or defaults as the Health and Safety Officer.

Specific Guidelines are provided where appropriate and also made available on request.

These include:

- Health and Safety guidelines relating to premises (under AUKY control and those used sessionally).
• First Aid and Accidents at work.

• Guidelines for Staff and volunteers working in Age UK York Shops.

• Guidelines for Staff and Volunteers working in Age UK York Clubs.

• Guidelines for Staff and Volunteers working within AGE UK YORK Practical Services.

• Guidelines for Staff and Volunteers working with and supporting AGE UK YORK Outings/Holidays.

Guidelines for Staff and Volunteers undertaking Home Visits including:

- Basic Rules
- Reducing the risk of aggression
- Physical attacks
- Personal possessions
- Travelling on foot
- Using Public Transport
- Driving
- Working Alone

Guidance on limitations on administration of medicines.

Training

AGE UK YORK provides training on a rolling programme on the following subjects:

- First Aid
- Moving and Handling
- Health and Safety
- Handling of HIV, AIDS and bodily fluids

AGE UK YORK Staff and Volunteers are welcome to attend these training sessions. Each service area has a responsibility to ensure its own volunteers are offered and receive training which is specific and required to work in that service area. Induction Training will also be given to all new volunteers where the importance of understanding the charity’s Health and Safety Policy will be emphasised.

Reviewed April 2012
F. EQUAL OPPORTUNITIES POLICY

Policy Statement

AGE UK YORK (AUKY) is committed to the welfare of older people and to maintaining their dignity and worth to society.

Prejudice, ignorance, apathy and fear lead to discrimination. Discrimination denies our human dignity, our freedom to be ourselves and our place in a free society. When even one person is deprived of these basic human rights, we are all diminished.

AGE UK YORK will not accept any form of discrimination in its work with, and for, older people. In particular, it will ensure that no one connected to the organisation will receive less favourable treatment on the grounds of age, disability, ethnic origin, gender, marital status, political allegiance, race, religious belief or sexual orientation.

AGE UK YORK will demonstrate its commitment to this policy by adopting a code of practice and a programme of action. This code will give guidance on employment practices, service provision and the general work of the organisation in our community. It will be reviewed and, when necessary, revised from time to time.

Why we have a policy statement

AGE UK YORK accepts and affirms its responsibilities under the Sex Discrimination Act 1975, the Race Relations Act 1976 and the Race Relations (Amendment) Act 2000 and all other legislation which supports and promotes the principles of equality of opportunity, including forthcoming legislation with regard to Age Discrimination.

The implementation of our Equal Opportunities Policy is intended to eradicate any practice which might, through discrimination in any form as outlined in the policy, prevent a person from obtaining or maintaining a job with AGE UK YORK, from taking part in its activities or benefiting from its services.

Our policy statement is a statement of intent. Our organisation is now publicly committed to doing something practical and visible about equality of opportunity. This is why responsibility for implementing the policy rests first with the Board of Trustees which has delegated day-to-day responsibility to the Chief Officer. All members of the Board, the staff and volunteers will be expected to play their part in ensuring that the policy is adhered to in their appropriate areas of responsibility and influence.

At first we will be setting ourselves these targets

- To increase awareness within the organisation of the needs of minority and disadvantaged groups.
- To increase the number of members of the organisation representing people who often experience discrimination.
- To examine our premises and equipment and to make those adaptations we can to make them more accessible to staff, volunteers and the users of our services.
To review our recruitment procedures and employment terms and conditions to ensure that they fully reflect our policies.

To examine whether there is a need to encourage recruitment of staff and volunteers from minority groups.

To examine our services and activities to ensure that they reflect the needs of people facing disadvantage.

To ensure that no member of staff, or volunteer, or the Board, or the users of our services suffer from any form of discrimination.

We will review how our policy has been working annually and, when necessary, make alterations or additions to our policy as a result of experience.

The Code of Practice follows as a guide to Board members, staff, volunteers and users of our services.

**Code of Practice**

**Provision of Services**

All the provisions and statements of intention contained in this Code of Practice which are relevant will also apply to the way in which the organisation offers services to all sections of the community of older people and invites them to share in its life and activities.

We shall do our best to help individuals to access our buildings in recognition of the Disability Discrimination Act 1995 and in particular ensure ease of access to any new buildings we acquire.

Users of our services and those who take part in our activities will be informed that our organisation is committed to a policy of equal opportunity, so that:

- users will know that the policy exists and is designed to guide them and those who work with them;
- users will know that they are invited to share the same commitment and are expected to be bound by the same policy;
- all who come into contact with our organisation will know of the standards we are trying to achieve, will be able to help us to achieve them and will know they have the right to complain through our established complaints procedure if the standards slip or the policy is ignored.

**Discrimination against older people**

AGE UK YORK recognises that it has a special responsibility to combat discrimination against older people. The organisation will actively campaign for the rights of all older people. (The terms and conditions of employment of the organisation will offer flexibility on the date of retirement.)
Race Discrimination

AGE UK YORK will not accept discrimination on the grounds of racial or ethnic background.

Gender

AGE UK YORK will not accept discrimination on the grounds of sex or marital status. Sexual harassment, of any kind, will be dealt with through the AGE UK YORK disciplinary procedures.

People with Disabilities

AGE UK YORK will not accept discrimination against people with disabilities. In the case of an existing Board member, staff member or volunteer becoming newly disabled, every effort will be made to retain or re-deploy the individual by mutual agreement.

Sexual Orientation

AGE UK YORK will not accept discrimination on the grounds of a person’s sexual orientation or declared sexual identity. The organisation regards a person’s sexuality as an entirely private and personal matter which will not affect recruitment, promotion or training for staff and volunteers, nor accessibility to services or other activities for any older person needing or seeking them. Harassment on the grounds of sexual orientation will be dealt with through the AGE UK YORK disciplinary procedures.

Health

AGE UK YORK will promote good practice in all aspects of health and safety at work. Staff and volunteers who begin to suffer from long-term and progressive illness will, whenever possible and subject to competence and ability, be offered continued work.

Staff Recruitment and Selection

AGE UK YORK will ensure that the ways in which jobs are designed, advertised and filled fulfil the requirements of our policy on equal opportunity. In particular:

- All job descriptions will be checked to ensure that they do not ask for unnecessary requirements or qualifications;
- All candidates for jobs will be informed about the equal opportunities policy of the organisation;
- Reasons for not short listing and for decisions at final interview will be recorded for the purpose of monitoring; all application forms, with these reasons attached will be retained for at least 6 months;
- The policy of the organisation on the employment of ex-offenders is that the safety of vulnerable older people is paramount. Some offences, even where "spent", will debar people from employment. (Ref. Recruitment of ex-offenders Policy and Policy on the secure storage, handling, use, retention and disposal of Disclosures
and Disclosure information.). Staff and volunteers who have direct contact with service users and/or have access to service users homes/telephone numbers/records will be subject to a Criminal Records Bureaux (CRB) check.

Application of Policy

It will be a condition of service that all staff adhere to AGE UK YORK’s equal opportunities policy. Failure to do so will lead to disciplinary action being taken.

All members of the Board of Trustees will be expected to accept and adhere to the provisions of the equal opportunities policy.

All volunteers will be expected to abide by the provisions of the policy in their work for the organisation.

Harassment of any kind (but specifically on the grounds of age, disability, gender, race or sexual orientation) will be considered a disciplinary offence. Harassment may involve derogatory or discriminatory remarks, ridicule, unwanted physical contact, demands for favours or physical assault. Any staff member who seriously or repeatedly harasses another staff member or anyone else connected with the organisation will be liable to dismissal for gross misconduct. Similarly, any Board member or volunteer found to have breached the rules of this Code of Practice in this regard will be asked to resign.

Responsibilities

The Board of Trustees has the first and final responsibility to promote, implement and review our policy.

The Chief Officer holds the day-to-day responsibility for ensuring that the policy is implemented and, in the first instance, for dealing with grievances or taking action on disciplinary offences.

It is also the responsibility of all staff and volunteers of the organisation to promote the policy.

Reviewed April 2012
G. CONFIDENTIALITY POLICY

AGE UK YORK staff and volunteers should ensure that any personal information disclosed to them in the course of their work is treated as strictly confidential and should only be disclosed to those who need to know, with the consent of the person concerned. An exception to that general rule can be made if the person is at risk or is putting others at risk. Any matter of concern must be reported to the Service Organiser or Chief Officer so that they can decide on the appropriate action.

AGE UK YORK adheres to the multi-agency policy "NO SECRETS" for the protection of vulnerable adults.

Confidential papers when not in use should be kept in a locked staff cabinet with access only by staff on a need to know basis (any exception to be agreed by the Service Organiser or Chief Officer). Confidential papers should be periodically weeded and those no longer needed should be carefully destroyed under the supervision of the Service Organiser.

Staff who transport client documents will ensure that they are kept safe and secure at all times.

AGE UK YORK is registered with the Data Protection Register. The above guidelines also apply to information stored on our computers. In accordance with the Data Protection Act 1984, data has to be obtained fairly (the person providing the information must not be misled about the purpose for which it is obtained), be accurate and up to date, and be used for ‘the support and maintenance of elderly people in York.’
H. FINANCIAL PROTECTION OF SERVICE USERS

STATEMENT

THE MONEY AND PROPERTY OF SERVICE USERS WILL BE PROTECTED AT ALL TIMES WHILST THE SERVICE USER IS RECEIVING SUPPORT FROM ANY PERSON REPRESENTING AGE UK YORK.

SAFE HANDLING SERVICE USERS MONEY AND PROPERTY POLICY

Involvement of AGE UK YORK representatives with service users money and or property.

• AGE UK YORK volunteers or staff should not become involved with the financial affairs of the service, unless they are in receipt of an AUKY service which clearly outlines the level of involvement agreed and documented at the service planning stage of our relationship with the service user/carer.

• When a service user is unable to take responsibility for their own financial affairs this is recorded in their initial assessment and an appropriate referral made if necessary to the Social Services Department. If AUKY representatives are required to work with and support older people who are unable to manage their own financial affairs, this is recorded on their assessment as a risk and appropriate good practice is agreed with the service user, family/carers/representatives, line management and where appropriate Social Services.

• AGE UK YORK Service Organisers and Managers will be responsible for ensuring that a volunteer / staff member with appropriate experience and skills will be assigned to the service user. The selection process will be recorded.

• Involvement with service users should not go beyond assistance with simple monetary transactions, e.g. shopping, collecting pensions, benefits or prescriptions, paying bills or carrying out other simple errands. Volunteers must not act as an agent or signatory unless that is identified in the user agreement.

• If a volunteer / staff member is required to enter the home of a service user in the absence of the service user, the volunteer should be accompanied by their organiser, another volunteer, another member of the care provision team or an appropriate representative of the service user. If no person is available to accompany the volunteer, the date, time and nature of the visit must be recorded by the AGE UK YORK Service Organiser.

• Appropriate training will be provided for volunteers involved with the handling of service users money (if required).

• If a volunteer has any concern regarding the safety and security of an older person’s financial affairs the volunteer must report the matter to their Service Organiser or the organisation’s lead officer regarding Elder Abuse.
• Senior Age UK Staff are required to complete the Register of Interests or involvement with any other separate organisation providing care or support services, or responsible for commissioning or contracting those services.

IN THE CASE WHERE AU KY IS PROVIDING A SERVICE WHICH DOES INVOLVE THE HANDLING OF A SERVICE USERS MONEY OR PROPERTY THIS CANNOT HAPPEN WITHOUT:

the user or carers explicit agreement and signature at the time of service/care planning the full documented knowledge of the Service Organiser the agreement of any appropriate relatives or interested parties, with the permission of the service user.

Good Practice Guidelines for handling service user’s money or property

Receipt of Payments from Service Users

If the service user is in receipt of a service for which there is a charge, all volunteers and staff will be trained in the safe and secure methods of dealing with service user’s money. Staff or Volunteers should not carry more than £50 cash at any one time.

• In Safe Hands – The billing process will be followed as per ISH procedures
• Handyperson - Service users paying for the service will be given a receipt on the spot. Money paid will be taken to the practical Services office, documented and banked by the Practical Services Manager.
• Net Neighbours – The collection of cash or cheques for the internet shopping service should follow Net Neighbours good practice instructions. Receipts should be given and money brought to the AU KY Walmgate Offices as soon as possible. Money will then be documented and banked. Staff should never carry more than £50 cash.
• General Donations – Should be received and a receipt given whenever possible. Money/cheques should be brought to the AU KY Walmgate Offices, documented and banked. Sizable donations will be followed up with a “thank you letter” where appropriate. When a donation is made for a particular service area, this will be documented appropriately and the service area credited with the donation on the sage finance system.

Payment of service user bills

• AU KY Benefits and Money Advice Service are required, on occasion to assist service users to manage the payment of bills/debts. Staff will record and date all transactions on service user confidential files and keep records of all correspondence. If staff are requested to handle an “unusual item” they must report it to their line manager, or bring written information regarding the issue to their supervision session.

• CBSS Community Support Workers may on rare occasions be required to help service users pay bills. Any money handling issues must be brought to
the attention of their line manager and documented appropriately.

- **Hospital Services Staff and or Volunteers** may on rare occasions be required to help service users pay bills. Any money handling issues must be brought to the attention of their line manager and documented appropriately.

### Shopping and Collection of Pensions

- AUKY representative who undertakes shopping for a service user or escorts a service user shopping must document the handling of money clearly, ensure receipts for goods purchased are provided for the service user. It is good practice to report any handling of service user money to the line manager. It is most important to report any accusation or disagreement over shopping money/change or goods to the line manager immediately.

- When shopping only the loyalty card of the service user may be used when purchasing goods for the service user.

- On the rare occasions that an AUKY representative assists an older person with their pension collection, either on their behalf or with them present, this should be cleared/reported to their line manager. Wherever possible the older person themselves should enter the pin number for the transaction. The AUKY representative should avoid knowing the pin number of a person whenever possible.

### Safeguarding the property of service users whilst undertaking work with them and reporting loss or damage to property whilst providing a service.

- AUKY representatives should endeavour to respect service user’s property at all times. In the event of an accident or damage to a service user’s property this should be reported to line management immediately so that appropriate action can be taken. If an accident has taken place an accident report must be filled in and reported to the Health and Safety Officer – James Player.

- In the event of a service user damaging property of an AUKY representative, this should also be reported to line management immediately so that appropriate action can be taken. If an accident has taken place an accident report must be filled in and reported to the Health and Safety Officer – James Player.

### Gifts and Bequests

- High standards of financial probity are essential in order to maintain a trusting relationship between the elderly people who use our services and the staff and volunteers who give the services.

- Staff and volunteers **must not influence** service users to give to them financial inducements, bequests or gifts.

- Staff and volunteers should tactfully **refuse any personal gift** offered to them
by a service user. As an exception to this general rule, staff and volunteers may accept small tokens of friendship and gratitude, e.g. box of chocolates, cake, flowers, handmade article.

**Good Practice Regarding Service Users and Wills/Legal documents**

- **The AUKY Insurance Arrangers are the only AUKY representatives** who should witness a will made by a service user. They may, however, ask a staff member to witness a will that has been drafted which does not involve any benefit to AGE UK YORK or to any staff or volunteers. If a service user asks for advice from a volunteer or staff member the user should be pointed towards consulting an accountant or a solicitor.

- The Chief Officer is the only person among staff and volunteers who may act as *executor to a will* by a service user. On very rare occasions, when there is absolutely no one else who can assist a service user in this way, the Chief Officer may accept joint Power of Attorney with a service user’s solicitor. These services will incur charges at the appropriate rate. If a service user cannot afford the services of a solicitor, then they will be referred to Social Services for social work support.

- If staff or volunteers have prior knowledge of the intention to make a *bequest* to them, they should attempt to dissuade the service user and suggest that a bequest to AGE UK YORK may be more appropriate.

- If staff or volunteers are, without their prior knowledge or despite their refusal or attempt at dissuasion sent a *gift* or are left a *bequest* or appointed as *executor*, this should be reported to the Chief Officer, who is responsible for deciding what action should be taken. If necessary, legal advice will be sought and the matter may be referred to the Board of Trustees.

The restrictions described above do not apply to:

- donations, legacies or gifts for AGE UK YORK to be used for its charitable work;

- charges or donations to volunteers set out clearly in AGE UK YORK description of the service (e.g. recommended payments by users to volunteers for In Safe Hands, donations from users to voluntary car drivers for cost of petrol, Day Centre charges).

**Good Practice with regard working with Service Users – as recommended by the Commission for Social Care Inspection**

- When working in a service user’s home it is recommended that AUKY representatives never use the service user’s telephone unless the matter is directly with regard to the service provided and with the permission of the service user or carer. If a personal call is made this should be on a personal mobile telephone and at the convenience of the service user.
• Representatives of AUKY should never involve a service user in gambling syndicates – e.g. National Lottery or Football Pools.

• Representatives of AUKY should never borrow money or items from services users or lend money or items to involve service users.

• Representatives of AUKY should never sell or dispose of goods belonging to a service user or their family.

• Representatives of AUKY should never sell goods or services to a service user; incurring a liability on behalf of the service user or their family.

• Representatives of AUKY should never take responsibility for looking after any valuable on behalf of a service user. The Chief Officer of the organisation may agree to the safe keeping of a service user’s will in the office safe, this will be reported to the Board of Trustees at regularly held Board Meetings.

• Representatives of AUKY should never take an unauthorised person including children or pets to the home of a service user without permission of the service user, their relatives or representative and the manager of the service.

**REVIEWED APRIL 2012**
POLICY AND PROCEDURE FOR THE INVESTIGATION AND ALLEGATION OF FINANCIAL IRREGULARITIES.

POLICY

AGE UK YORK Trustees, Staff and Volunteers will not tolerate the abuse of our service users through the misuse of position or power.

Any case of financial irregularity should be reported immediately. An investigation will take place at the appropriate level and necessary action will be taken to protect the service user, person affected or organisation.

Financial irregularities could include

Financial abuse of an older person, service user, carer
Financial abuse of a Trustee, volunteer or member of staff
Misuse of AUKY funds/monies/resources

PROCEDURE

• If any representative of AUKY suspects a financial irregularity they must report it to their line manager immediately – in the same way that a case of suspected elder abuse would be reported. If the financial irregularity suspected involves a senior member of staff or Board Member, the Chair or appropriate other Board member must be informed.

• An investigation will take place in line with the AUKY Disciplinary and Grievance Procedure. Attention will be paid to the AUKY Whistle Blowing, Data Protection and Confidentiality policies to protect those involved appropriately.

• Where appropriate the Police will be informed of the irregularity and charges/action taken as necessary.

• Social Services and the Commission for Social Care Inspection may be informed depending upon the outcome or process of the investigation and findings.

REVIEWED APRIL 2012
I  GOOD PRACTICE NOTES FOR STAFF AND VOLUNTEERS

COURTESY

AGE UK YORK staff and volunteers should treat older people with respect and consideration, giving them their due dignity. Behaviour should be appropriate to the relationship with the older person. The form of address favoured by the service user should be used.

RISK TAKING

AGE UK YORK staff and volunteers should respect the right of a service user to take risks.

However, if they have reason to believe that a service user or carer is at significant risk through self-neglect, or as a result of their behaviour or lifestyle, or because of the actions or behaviour of others, they should inform the Organiser of that service or the Chief Officer. The latter would consider urgently whether it is appropriate to inform the relevant statutory officer, GP, next-of-kin, etc.

ADMINISTRATION OF MEDICINE

AGE UK YORK staff and volunteers should not administer any medical treatment to service users.

Exception could be made to this general rule for administering first aid in an emergency, but the service user’s GP should be consulted as soon as practicable. Alternatively, if the situation warrants, an ambulance should be called.

In Safe Hands staff/volunteers may help the service user to take prescribed medicine, but only with the consent of the user and at the written request of the user’s informal carer who should set out in writing the medicines and amount/frequency of administration. Befriending volunteers may also do the same on outings, in their case the written authority and information should be given by an authorised person in the care home.

ALCOHOL, DRUGS

When working on behalf of, or representing AGE UK YORK, volunteers and staff must never be under the influence of alcohol or drugs. Volunteers and staff must be aware also that alcohol or drugs can linger in the body for some time after having been consumed, and this can have an effect on the person even the morning after the night before. Those volunteers or staff who are required to drive or operate machinery on behalf of AUKY must be aware of the law relating to the safe use of alcohol and driving. If volunteers or staff are users of prescribed drugs, which may have an effect on driving and/or their physical or mental capacity to undertake normal duties, they must inform their organiser in order to have their work re-allocated or discuss job roles.
SMOKING

AGE UK YORK is a NON SMOKING ORGANISATION. When working on behalf of, or representing AGE UK YORK, volunteers and staff must not smoke.

Those staff or volunteers who are smokers and require a break during the day to smoke, must arrange the breaks with their organiser/supervisor. Volunteers and staff who smoke MUST ensure that when taking smoking breaks no one else is adversely affected by their action, either by having to breathe in smoke or by being left to manage activities alone, too often or for too long. Smokers taking breaks can only do so with the cooperation and sanction of their organiser or colleagues.

AGE UK YORK Trustees also request that any member of staff requiring a smoking break should not take their break at the front of any of our premises, particularly our shops. Staff and volunteers must take their break at the back and away from the back door to prevent smoke drifting into the building. Only when there is no back entrance we require staff and volunteers to move well away from the front of the building. On no account should shop premises be left empty in order for a smoking break to be taken.

The July 2007 legislation requires that no one may smoke in a “work place”, the most publicised areas affected are restaurants, pubs and offices. However there is also an impact on home visiting services, as the “home” becomes the work place of the visitor! This situation obviously affects the staff and volunteers of AGE UK YORK when we visit a smoking household.

As stated above our policy outlines that no member of staff or volunteer may smoke at work, in an AGE UK YORK vehicle or in the home of a service user. The new legislation aims to protect the worker or volunteer. We are therefore pointing out to any of our service users who smoke, (or smoking family members who may be in the house when we are there) that our staff and volunteers have the right to refuse to enter the home of a smoker.

The Board of Trustees of AGE UK YORK will support and encourage any member of staff who smokes, who needs to attend “giving up” health sessions with their G.P.

Reviewed April 2012

GOODWILL OF VOLUNTEERS

Volunteers have no legal obligations towards AGE UK YORK which is reliant on their goodwill and kindness for their continued support. The high quality of AGE UK YORK services to older people reflects the personal devotion of individual volunteers.
J. COMPLAINTS, COMPLIMENTS AND COMMENTS
(VOLUNTEER GUIDELINES)

We hope that you find the services provided by AGE UK YORK helpful and supportive. We would always welcome your comments and suggestions on how our services could be improved. Naturally, being told when we do things particularly well pleases and encourages us, but if you have a complaint we like you to let us know so we can look into the matter.

In the first place, please give your complaints, compliments and comments to the Organiser of your service.

In the case of a complaint, if there is a problem which remains unresolved by the service Organiser, you may contact the Chief Officer of AGE UK YORK, who may ask you to put your comments in writing or arrange for your comments to be recorded and agreed with you. We hope that by this stage any difficulty would have been solved. However, if you are unhappy, you have the right to approach the Complaints Committee of AGE UK YORK Board of Trustees and you may have a friend or relative with you when you attend the Committee meeting.

The Organiser of your service, the Chief Officer of AGE UK YORK and the Complaints Committee of AGE UK YORK Board of Trustees can all be contacted at:

AGE UK YORK
70 Walmgate
York YO1 9TL
Tel: (01904) 627995
Fax: (01904) 658463
E-mail (name)@ageukyork.org.uk

COMPLAINTS PROCEDURE SPECIFIC TO IN SAFE HANDS

The Complaints procedure for the In Safe Hands Services is as above. However the In Safe Hands services are required to register as a Domiciliary Care Agency under the National Care Standards Act 2000. We are therefore also informing you of the following contact details for the National Care Standards Commission and the Social Services Inspectorate.

General Social Services Council members:

Social Services Inspectorate, Headquarters,
Richmond House, Whitehall, London, SW1A 2NS
0207 712 2171

Social Services Inspectorate, Yorkshire and Headquarters,
8th Floor 8E Quarry House,
Quarry Hill, Leeds LS2 7UE
0113 232 4000
Care Quality Commission
What we undertake to do for our Service Users

We welcome comments on our services from those who use them.

All complaints and comments will be considered promptly, a serious effort will be made to resolve any problems and a personal and courteous response will be given. All compliments will be brought to the attention of those who have earned them.

REVIEWED APRIL 2012
### K. INDIVIDUAL SERVICE AGREEMENTS

<table>
<thead>
<tr>
<th><strong>What we ask of you</strong></th>
<th><strong>What you should expect of us</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Duties</strong></td>
<td>A written statement of the role you are being asked to fulfil, and the tasks you can reasonably be expected to carry out.</td>
</tr>
<tr>
<td><strong>2. Hours</strong></td>
<td>We will discuss any constraints on your time with you when arranging a placement.</td>
</tr>
<tr>
<td>Depending on your area of work, you will be asked to agree to certain regular commitments. This may include training time as well as direct work with the organisation. If you are not able to attend at the agreed times, please try and give us as much notice as possible.</td>
<td></td>
</tr>
<tr>
<td><strong>3. Holidays</strong></td>
<td>It is our policy that you should not be out of pocket.</td>
</tr>
<tr>
<td>There are no formal restrictions on holidays. In some cases, following extended absence, refresher or update training may be required. Please give us as much notice as possible of absences, so that we can make alternative plans.</td>
<td></td>
</tr>
<tr>
<td><strong>4. Expenses</strong></td>
<td>We will seek to pay expenses promptly.</td>
</tr>
<tr>
<td>Please keep a record of travel between your home and place of work, and also any other travelling in the course of your work. You are asked to use the most economical form of transport that is reasonable. You can also claim for other subsistence expenses when approved by your organiser. Please try to submit expense claims promptly.</td>
<td></td>
</tr>
<tr>
<td><strong>5. Confidentiality</strong></td>
<td>We will inform you if receipts are required on any occasion.</td>
</tr>
<tr>
<td>You are asked to abide by the organisation’s policy. This means, in particular, that you should not discuss any individual’s circumstances outside of the organisation. You are also asked to treat information regarding the internal affairs of the organisation as confidential.</td>
<td></td>
</tr>
<tr>
<td>You can expect us to treat information about you as confidential. We will not provide information about your work as a volunteer with us to a third party without your consent, unless required by law to do so.</td>
<td></td>
</tr>
</tbody>
</table>
6. **Equal Opportunities**
You are expected not to discriminate against older people we work with, or against your colleagues, on any grounds, e.g. race, age, gender, religious beliefs, disability or class.

We will not tolerate any offensive remarks or other abusive language or behaviour either by the people who use our services or the people you work with.

7. **Problems**
Most problems are dealt with through day-to-day supervision. Sometimes, specific one-to-one discussions are needed to explore a problem further.

If your organiser feels that your behaviour or performance is unsatisfactory, they will discuss with you the need to make changes. If these are not achieved, you may be asked to leave.

In the case of gross misconduct, you may be asked to leave or be suspended whilst the matter is being investigated.

8. **Gifts from Service Users**
You must read and observe our guidelines on how to handle situations where service users offer any form of gift. In general, you should discourage the practice where this can be done without giving offence.

You must never encourage an older person to offer you money or goods, or to consider leaving you a legacy.

9. **Supervision and Appraisal**
You will be offered supervision on a regular basis. This is to help us understand how you can best meet the needs of the service.

Where specific training and development needs are identified, the organisation will endeavour to meet them.

10. **Training**
You are asked to accept the need for continued training to meet changing needs and to improve the standards of our services.

We will make training available in a range of appropriate ways to meet your individual circumstances. We will meet your expenses for attending training and will offer training which assists with your personal and career development.
11. **Health and Safety**
You should inform your organiser of any unsafe practices or any accidents and record them in the accident book. You are asked to make yourself aware of all safety policies, and observe them at all times.

We try to provide a safe working environment and will treat all issues of health and safety seriously.

12. **Mistakes and Problems**
If, as a volunteer with AGE UK YORK, you have made a mistake, perhaps in terms of information given or assistance offered, you must let us know immediately.

Our insurance provides us with an indemnity against your mistakes, so that you cannot be held individually liable for any action taken in good faith.

13. **Leaving AGE UK YORK**
If you are no longer able to continue to work with us, we ask that you give us as much notice as possible so that we can make alternative arrangements to carry out your responsibilities.

We will provide you with a reference indicating the skills and knowledge you have acquired, as well as the qualities we have observed.

14. **Retirement**
There is no formal retirement age. We encourage older people to continue to offer their skills and experience as volunteers. Because of our responsibilities under health and safety legislation, we will review your ability to continue to carry out certain tasks.

In some situations there may be restrictions on activities due to conditions relating to insurance. These will be discussed with individual workers as they arise.

15. **Other benefits**
When you have been a volunteer with AGE UK YORK for a minimum of six months, you are entitled to take out insurance through Age UK York Insurance Services (regardless of your age!) This can include home and contents, travel and car insurance.

**Reviewed April 2012**
AGE UK YORK GUIDELINES

AGE UK YORK POLICIES AND PROCEDURES

DATA PROTECTION

Data Protection Policy Statement

AGE UK YORK (AUKY) is committed to meeting its obligations under the DATA PROTECTION ACT of 1998. AUKY will strive to observe the law in all collection and processing of subject data (i.e. information (data) about any person (subject) in connection with AUKY: client, volunteer, Board Member or staff member) and will meet any subject access request in compliance with the law. AUKY will only use data in ways relevant to carrying out its legitimate purposes and functions as a charity in a way that is not prejudicial to the interests of individuals. AUKY will take due care in the collection and storage of any sensitive data. AUKY Board of Trustee members, volunteers and staff (collectively referred to as “workers”) will do their utmost to keep all data accurate, timely and secure.

All AUKY workers, whether permanent or temporary, must be aware of the requirements of the Data Protection Act when they collect or handle data about an individual. AUKY workers must not disclose data except where there is subject consent, or legal requirement. Data sent to outside agencies must always be protected by a written contract. All collection and processing must be done in good faith.

Data storage will be monitored and regulated by the Data Protection Working Group (DPWG) consisting of AUKY Chair, Chief Officer, Deputy Chief Officer and Information Officer. All records of Data Protection complaints will be kept in the Finance and Administrative Office in the Walmgate AUKY building, along with our organisational complaints policy and paperwork records. There will be a Repository of all AUKY statements of Data Protection Law compliance and information about any contacts made with the Data Protection Registrar. This information will be available to staff and data subjects on request.

AUKY will inform subjects of any processing or disclosure that does not fall within AUKY’s purpose in a way that any individual supplying could be expected to understand. AUKY will keep notification up to date.

Principles of data protection outlined in the Data Protection Act:

Anyone processing personal data must comply with the eight enforceable principles of good practice. They say that data must be:

- fairly and lawfully processed
- processed for limited purposes
- adequate, relevant and not excessive
- accurate
- not kept longer than necessary
- processed in accordance with the subject’s rights
- secure
- not transferred to countries without adequate protection
Policy on collecting subject data

AUKY will only collect data that is relevant to the carrying out of the legitimate purposes and functions of the charity in a way that is not prejudiced to the interests of individuals. All data on individual subjects will be treated in a consistent way. Subjects will be informed about how AUKY will store and use the data at the time of collection. This will require a standard statement to be sent in all written requests for data and a similar verbal script to be used for phone data collection. Where AUKY intends to use data for its main purposes – to promote the well being of the older people of York – subjects will be deemed to have given their data for this purpose. If other use is to be made of the data, the subject will be approached to give express permission.

AUKY will strive to ensure that data collection is as accurate as possible, given the methods used in collection. Data may be stored in many ways such as data-bases, manual files or word or excel files. The data will be collected consistently no matter where the data is to be stored.

Sensitive Data

AUKY will strive to ensure that sensitive data is accurately identified on collection so that the proper safeguards can be put in place. Sensitive data means data consisting of information relating to the individuals: a) racial or ethnic origin b) political opinions c) religious beliefs d) physical or mental health e) sexual life f) civil or criminal offences.

Procedures for collecting subject data

- Workers are responsible for ensuring that all collected data is accurate
- Workers are responsible for ensuring that sensitive data is identified when collected and will inform the subject that this data will be stored at the time of collection.
- All personal information should be dated at the time of collection so that records can be archived at an appropriate time.
- When the new AUKY data-base is in use all workers will be trained in the use of the system, only named appropriate workers will have access to subject data.

Statement for written forms and web/email communications:

When data is collected the following statement will be included in all written forms and also web/email communications as they are updated throughout the year.

AUKY will store and process your data (information) in accordance with the requirements of its Data Protection Policy and in keeping with the Data Protection Act of 1998.
Policy for Data Storage and processing

AUKY will only hold data that is relevant to the carrying out of the legitimate purposes and functions of the charity in a way not prejudicial to the interests of individuals. Information will be accurate and timely and will be held in an environment as secure as possible. AUKY workers will be responsible for ensuring that all regular data care procedures are fully and conscientiously followed. All ordered manual files and databases will be kept up to date and will have an agreed archiving policy. Data no longer required for the legitimate purposes of AUKY will be regularly purged.

All individual data will be kept secure, by regular office security procedures or through controls over the computer network. Sensitive data will be treated with appropriate security. Workers will take care to meet high standards of security by disposing appropriately of any written reports, which are generated from individual records.

Any data processing will only be allowed where there is a clear rationale for the activity which meets the Data Protection Act criteria. A database will be maintained and all paid staff will be responsible for keeping this up to date.

Where data is passed to a third party AUKY will ensure that a written contract is put in place that states that the third party will work within AUKY’s data protection policy

Procedure for Data Storage and Processing

1. All appropriate data processing should be included in existing AUKY databases and subsequently in the organisational database.
2. All paid staff must take responsibility for following through any data care work required of them to maintain accurate organisational data systems.
3. Archiving policies for data no longer needed in our storage systems will be set up for all data stores. (To be completed by April 2004). A clear rationale must be supplied for personal data to be kept beyond five years.
4. All data will be stored in secure cabinets and precautions will be taken to avoid letting data become accidentally disclosed.
5. Any agent employed or volunteering to process data on AUKY’s behalf will be bound to comply with AUKY’s data protection policy by a written contract.
6. Sensitive data should not be kept unless agreed by the Data Protection Working Group (DPWG) at AUKY Walmgate.
7. Information that is stored on a laptop should be password protected.

Policy on Disclosures

AUKY will not allow data collected from subjects to be disclosed to third parties except in circumstances, which meet the requirements of the Data Protection Act. This will be either because:

- the subject has consented to the disclosure
- AUKY is legally obliged to disclose the data
• there is a business requirement to disclose data that is within the remit of the Data Protection Act and is not prejudicial to the interests of the individual.

The swapping of any data collected by AUKY will only take place where the subject has been informed about this use of their data and offered the chance to opt out.

**Procedure on Disclosures**

1. All workers must ensure any general disclosure is recorded on a record of disclosures held by the AUKY Information Officer. The record will include a clear rationale as to why this is taking place.
2. Any new disclosure to be made must be checked for suitability by the DPWG. This may be referred to the Data protection Registrar for advice.
3. Any request for data based on a legal requirement e.g. from the Police or other body, must be put in writing and be checked against the advice of the Data Protection Registrar for advice.
4. All workers have a duty to protect individual’s data from accidental disclosure:
   - Do not give out passwords to other people, who will then have access to the data you are entitled to view
   - Do not recycle reports that contain personal data
   - In particular, take care to ensure that data is not left about on laptops or in files out of the office where they can be accessed by other people who are not AUKY workers.
5. In cases where data is disclosed to non-AUKY staff, staff must ensure that subjects have been informed of this use of their data, and why this is done. They must have had an opportunity to opt-out.

Where sensitive data is involved, workers should not disclose data to outside agents except in cases agreed by the DPWG.

**Subject Access Policy**

AUKY will provide information in response to any reasonable subject access request. AUKY will ensure data is kept in an accessible form to facilitate subject access.

**Procedure on Subject Access Policy**

1. Staff/workers will make every effort to ensure that immediate action is taken when a data access is requested. They will contact the DPWG immediately.
2. A standard letter (amended as appropriate) will be sent to the subject stating AUKY policy on subject access. This will promise to provide the required data to the best of AUKY’s ability within 40 days. AUKY reserves the right to ask for payment.
3. A search will be set up by the DPWG to ensure that all relevant data will be collected and collated ready to present to the subject. The search will include all electronic data and manual files if required. Information on data collection, storage, processing and transfer may be required.
4. The data will be offered to the subject at AUKY’s premises with a member of paid staff on hand to help with any queries or interpretations. If the subject is unable to visit AUKY premises, alternative arrangements can be negotiated.

**Policy on Complaints and Queries**

AUKY will respond to any complaints as quickly and responsively as possible. Any letter we receive in relation to the Data Protection Act, that questions our policy and/or procedure will be dealt with immediately.

Records will be kept of all correspondence for five years.

**Procedure on Complaints and Queries**

1. Notify the DPWG
2. Continue to inform the DPWG of any correspondence and developments that occur.
3. Process complaint alongside organisational AUKY complaints procedure.
4. Continue to inform the DPWG of any correspondence and developments that occur.
5. Process complaint alongside organisational AUKY complaints procedure.