

## **Age UK Later Life Goals Programme Information Protocol Fair Processing Notice**

Age UK's Later Life Goals programme has agreed to share some basic information about individuals who have used the programme to see how well our service works in providing advice to people experiencing a life event.

We hope that through studying your records and those of others receiving the service, we can make this service better for others in future. This Fair Processing Notice is relevant to people who have engaged in the programme in the Local Age UKs listed below and have given consent to data sharing.

1. Age UK Bath & North East Somerset
2. Age UK Blackburn with Darwen
3. Age UK Bristol
4. Age UK Cheshire
5. Age UK Gwent
6. Age UK Hertfordshire
7. Age UK Leeds
8. Age UK Lindsey
9. Age UK Mid Devon
10. North Tyneside
11. Solihull
12. Staffordshire
13. Age UK Surrey

The first principle of the Data Protection Act 2018 requires that the processing of data must be fair, lawful and transparent. To meet this requirement Age UK (the national charity – hereafter referred to as “Age UK National”) and your local Age UK are under a duty to supply you with a Fair Processing Notice.

In a sharing context, a Fair Processing Notice should at least tell a data subject:

- The identity of the organisation who controls the data that is being shared
- Who your information is shared with
- Why your information is going to be shared

### **Referrals from local Age UKs**

If you have received the service (Later Life Goals Programme) via your local Age UK:

- The organisation controlling the data that you have supplied is your local Age UK
- The organisation with whom your information will be shared will be:
  - a) Age UK National – responsible for management of the programme and reporting to the funder <https://www.ageuk.org.uk/>
  - b) The Masonic Charitable Foundation – funder of the programme <http://mcf.org.uk>
  - c) As yet to be selected evaluation team – details of this organisation will be updated once they are appointed. Due to the nature of this project, we haven't yet chosen the evaluation agency we will be using. We will however update this information as soon as we can and please be assured, we will have controls in place to protect your data.
- The reason your data is being shared with the organisations listed above in points a) to c) is to report on the programme, see how well the service works in providing advice to people experiencing a life event, as well as to improve the service for others in the future.

### After receiving the service

The funder of the programme and the evaluation team are the only partners we will be sharing your non-identifiable data with in an anonymised report format.

Once selected, the evaluation team will be the only organisation with whom we will share your identifiable personal information (name, contact details and the other information you provide on the client satisfaction survey). All completed client satisfaction surveys will be shared with evaluation team and your contact details will also be shared with them if you opted in to receive follow up contact from them.

All members of staff employed by the funder of the programme and the evaluation team will be bound by confidentiality clauses in their employment contracts, which means that information that you provide must be held in confidence and not shared with anyone else unless:

- These organisations are legally obliged or permitted to disclose the information to another organisation or person, or;
- You or your carer provide consent to share the information

<b>Please read the information in the table below which gives details of what we have proposed for the evaluation of this programme.</b>	
<b>Question</b>	<b>Answer</b>
Why do you want to share information about me?	<p>The service you receive (Later Life Goals Programme) will be delivered via your local Age UK.</p> <p>After you received the service, Age UK National would like to see how well the service works in providing support to people experiencing a significant life event.</p>

<p>Who will be using my information?</p>	<p>A yet to be selected evaluation team will analyse your results from telephone questionnaire surveys and telephone interviews.</p> <p>Age UK National will use your data to assess how the service is working.</p>
<p>What information will be shared?</p>	<p>Your non-identifiable data such as date and length of appointment with your local Age UK, which organisation you were referred from, your age, gender, ethnicity, living situation, outcomes of benefit check session, and any other services you were referred on to for further support.</p>
<p>Will any identifiable personal details be shared?</p>	<p>The evaluation team (once appointed), and the funder of the project, the Masonic Charitable Foundation, are the only organisations with whom we will share your identifiable personal information (name, contact details and the other information you provide on the client satisfaction survey). All completed telephone questionnaire surveys will be shared with the evaluation team if you have opted in to receive follow up contact from the evaluators.</p>
<p>What happens after my data is shared?</p>	<p>The selected evaluation team will analyse the data collected in order to decide upon findings and recommendations from the evaluation. The findings will be presented in a report to be made available on the Age UK National website. No information about individuals will be published.</p>
<p>How long will my data be stored?</p>	<p>The information held by the evaluation team once they have been selected will be destroyed <b>one year</b> after the publication of the final report. If you would like more information on this, please email <a href="mailto:Justin.Butler@ageuk.org.uk">Justin.Butler@ageuk.org.uk</a>.</p> <p>Your local Age UK will retain your personal data for a minimum of 6 years. Age UK National and external quality standards require I&amp;A records to be held for a minimum of 6 years, for quality assurance purposes and as required by our insurers.</p> <p>If you have provided consent for your story to be shared as a case study, this story may be used within a three year period.</p>
<p>Will my data be looked after safely?</p>	<p>Yes. Your local Age UK has signed a data sharing agreement with Age UK National which details their compliance with requirements under the Data Protection Act 2018 (DPA) and the General Data Protection</p>

	<p>Regulation (GDPR) and it will observe all its obligations under the DPA and GDPR, which arise in connection with the Programme and this Agreement.</p> <p>Your information will also be sent securely to the evaluation team and they work under strict instructions to keep your information confidential.</p> <p>Information on the evaluation teams data sharing policies will be available here once they are selected:</p> <p><a href="https://www.ageuk.org.uk/our-impact/programmes/later-life-goals">https://www.ageuk.org.uk/our-impact/programmes/later-life-goals</a></p>
<p>What are the potential risks for me?</p>	<p>The risks are that staff working at your local Age UK or Age UK National, or the evaluation team, may be able to identify that you have received this service. Please note however that all staff at Age UK (both local and national) will have received relevant training and all organisations adhere to strict data handling policies (as detailed above). Age UK National has taken steps to ensure your personal data will be both minimised, anonymised and retained for no longer than necessary.</p> <p>Your local Age UK has signed a data sharing agreement with Age UK National which restricts the use to which they can use personal data and put obligations on them to keep it secure.</p> <p>Once selected, the chosen evaluation team will have a similar policy in place, as detailed above. Your details will never be shared with any other third parties.</p>
<p>What is the difference between local and national Age UK?</p>	<p>Although we both operate under the same brand, Age UK National and local Age UKs are separate charities within their own rights. This is why they have been referred to as separate entities within this document.</p>
<p>Why don't you have details of the evaluation company you are using yet?</p>	<p>Due to the nature of the project, and the need for the project to be set up before choosing an evaluation team, the organisation that will evaluate this project has not been selected yet.</p>