

## Age UK Warm and Well Programme Information Protocol Fair Processing Notice

Age UK's Warm and Well 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 on income maximisation via benefit checks and providing information on staying warm in the home.

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 Cymru Swansea Bay
2. Age UK Bedfordshire
3. Age UK Bromsgrove, Redditch and Wyre Forest
4. Age UK County Durham
5. Age UK North Yorkshire & Darlington
6. Age UK Devon
7. Age UK Ealing
8. Age UK Hereford & Localities
9. Age UK Herefordshire & Worcestershire
10. Age UK Hertfordshire
11. Age UK Hillingdon, Harrow & Brent
12. Age UK Isle of Wight
13. Age UK Mid Mersey
14. Age UK Milton Keynes
15. Age UK Norfolk
16. Age UK Solihull
17. Age UK South Lakeland
18. Age UK Surrey
19. Age UK Wandsworth
20. Age UK Wiltshire

The General Data Protection Regulation (GDPR) sets out seven key principles to ensure that that personal data is processed fairly. These are followed alongside the updated Data Protection Act 2018 (DPA). These include:

- Lawfulness, fairness and transparency
- Purpose limitation
- Data minimisation
- Accuracy
- Storage limitation
- Integrity and confidentiality (security)
- Accountability

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
- The agencies that your information is likely to be shared with
- The reason it is being shared

### Referrals from local Age UKs

If you have received the service (Warm and Well 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 funder of the programme
  - c) Wavehill – independent social and economic research company who are undertaking the evaluation. <http://www.wavehill.com/>
- The reason your data is being shared with the organisations listed above in points a) to d) is to report on the programme in the following ways: how well the service works in providing advice on income maximisation via benefit checks conducted; the information that was provided on staying warm in the home; as well as to improve the service for others in the future.

### After receiving the service

The funder of the programme and Wavehill (the evaluation team) are the only partners we share your non-identifiable data with, which will be in an anonymised report format.

Wavehill (the evaluation team) is 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 Wavehill and your contact details will also be shared with Wavehill if you opted in to receive follow up contact from the evaluation team.

All members of staff employed by the funder of the programme and Wavehill are 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
- You/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?	The service you receive (Warm and Well programme) will be delivered via your local Age UK. After you have received the service, Age UK National would like to see how well the service works in providing advice on income maximisation and providing information on keeping warm in the home. Wavehill is undertaking an evaluation of this service to see if the support provided to you has had any impact on increasing your annual income, through identifying unclaimed benefits. In order to do this evaluation, we want to be able to share basic information about you with Wavehill, who will undertake the evaluation, but they will not use information provided on client satisfaction surveys to contact you; without having first received your expressed consent to do so.
Who will be using my information?	Wavehill, a reputable independent research organisation, will subsequently analyse your results from the client satisfaction surveys and telephone interviews.
What information will be shared?	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.
Will any identifiable personal details be shared?	Wavehill is 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 Wavehill, but your contact details will only be used by Wavehill to contact you if you have opted in to receive follow up contact from the evaluation team.
What happens after my data is shared?	Wavehill analyse the data collected in order to decide upon findings and recommendations of evaluation. The findings will be presented in a report to be made available on Age UK National's website. No information about individuals will be published.
How long will my data be stored?	The information held by Wavehill will be destroyed <b>6months</b> after the publication of the final report. If you would like more information on this, please email Wavehill at <a href="mailto:wavehill@wavehill.com">wavehill@wavehill.com</a> Your local Age UK will retain your personal data for a minimum of 6 years. Both internal Age UK and external quality standards require I&A records to be held for a minimum of 6 years, for quality assurance purposes and as required by our insurers. If you have agreed to provide a case study your consent is valid for three years, after which time your personal details and story will be securely deleted.
Will my data be handled safely?	Yes, your information will be sent securely to Wavehill, who work in adherence to strict rules to keep your information confidential. Information on Wavehill's data sharing policies can be found here: <a href="https://www.ageuk.org.uk/our-impact/programmes/warm-and-well/">https://www.ageuk.org.uk/our-impact/programmes/warm-and-well/</a> Your local Age UK has signed a data sharing agreement with Age UK which details their compliance with requirements under the Data Protection Act 2018 and of the General Data Protection Regulation EU 2016/679 ("GDPR") which came into practice on 25 <sup>th</sup> May 2018.
What are the potential risks for me?	The risks are that staff working at your local Age UK or Age UK National and Wavehill may be able to identify that you have received this service. Please note however that all staff at Age UK will have received relevant training and all organisations adhere to strict data handling policies (as detailed above). Age UK have taken steps to ensure your personal data will be both anonymised and retained for no longer than necessary. Your local Age UK has signed a data sharing agreement with Age UK National which restricts the use of personal data and put obligations on them to keep it secure. Wavehill has a similar policy in place, as detailed above. Your details will never be shared with any other third parties.
What is the difference between local and national Age UK?	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.