



Silverlinks: enabling older people to manage life changes.

Silverlinks Project Officer's Toolkit



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Contents of this toolkit

	Page no.
1. Introduction – Silverlinks project and purpose of the toolkit	2
2. Volunteer recruitment and training	4
3. Beneficiary recruitment	10
4. Promotion	13
5. Monitoring and evaluation	14
6. Templates and documents	18

SECTION 1. INTRODUCTION

This section explains what the Silverlinks project is, and the purpose of this toolkit.

About this toolkit

This toolkit is provided for workers who are about to begin to deliver a Silverlinks project.

The toolkit is not a prescriptive “how to” manual, but will give you some ideas about how to get up and running, including different approaches taken by our pilot projects and lessons learned along the way. The toolkit also contains examples of documents and materials you might find useful and can adapt for your own use.

It’s not intended to tell you how to run your project, as each locality and organisation will be different, but we hope that some of the documents and ideas will be useful to you.

What is Silverlinks?

The Silverlinks pilot project was pioneered by Care & Repair agencies in Bristol, Leeds and Manchester, between October 2012 and March 2014.

Silverlinks is a project which supports older people who are making decisions about their housing and living situations. Many older people, when faced with a significant life change, such as the death of a partner or the onset of ill health or disability, have to make decisions about their housing. They may feel that their home no longer suits their needs and requires adaptations; or bereavement may prompt them to consider moving closer to family.

Silverlinks enables older people facing these choices to talk to an older volunteer who has already gone through and dealt with a similar situation. Silverlinks volunteers are a mixture of older people including those who have used Care & Repair services, people who have supported relatives, and people with personal experience of facing and dealing with housing and care dilemmas.

Volunteers are trained to offer a “listening ear” to an older person facing a housing dilemma. They will share the benefit of their personal experience, and provide information about housing and care services available through Care & Repair, Age UK or other general providers. Most importantly, they will offer the chance for the older person to talk through their situation and give them breathing space to make the decision that’s right for them.

Silverlinks is not a befriending or mentoring project, but is a “peer support” project. There is not necessarily an ongoing relationship between the volunteer and the older person, and support may be in the form of a telephone call or one off meeting. Of course there are situations where support lasts over a longer period of time, for example someone struggling to make a decision may ask for more than one

meeting, or a number of weekly telephone calls may be required.

As well as the “peer support”, there are other elements of the Silverlinks project that we hope will pre-empt housing and care difficulties. These enable older people to think ahead so they are in a better position to make informed decisions and plan for their housing and care before they are forced to by change of circumstance.

These are covered in separate guides, and include:

- Later Life Housing and Care Options “Pass it On” training and workshops, which Silverlinks has delivered to a wide range of groups, asking each trainee to pass on the information about options to other older people;
- Planning Your Home for Later Life, or “Thinking Ahead” which has been trialled as part of pre-and early- retirement training;
- An older-people friendly audit, which has been carried out by older people in neighbourhoods to influence planning decisions so that they take account of the needs of an older population.

TEMPLATES AND DOCUMENTS:

1a. Silverlinks brochure

SECTION 2. VOLUNTEER RECRUITMENT AND TRAINING

The main part of the Silverlinks project is recruiting older volunteers, providing them with training, and linking them with older people who would like to talk to someone who has dealt with a similar situation to themselves (referred to as “beneficiaries”).

The role of the volunteer

The role of a Silverlinks volunteer will vary according to the amount of time and the type of skills they can offer. A sample role description is included in this pack.

The main essence of the role is to support another older person who is thinking about moving home, or having repairs or adaptations done to their current home. The volunteer is there to listen to the beneficiary and share the benefit of their own experience to enable the beneficiary to reach their own decision. The volunteer may provide information about Care & Repair, Age UK or other services which are relevant (e.g. adaptations, Housing Options), or signpost to other organisations e.g. First Stop (www.housingcare.org.uk) The volunteers are not expected to know everything about housing and care options. The main purpose is to provide a listening ear and someone for the beneficiary to talk to about their housing situation.

If your volunteers are particularly active and confident, they may be interested in taking part in other activities such as attending events to talk to older people, giving out leaflets, or doing talks for groups of older people about how to access information and support. If your volunteers are not so physically mobile they can still play a valuable role from home, e.g. offering one to one support via the telephone rather than home visits.

Recruiting volunteers

During our pilot project, the local agencies approached the volunteer recruitment and training in different ways. We found that some things that worked well in one locality were not necessarily the best approach in another. Below is a summary of the main approaches trialled to date, what worked well and what the challenges were. You could try one or more of these methods and see what works best for you, or develop new ideas and approaches.

Contacting existing or previous clients

One approach we trialled was to ask workers within the Care & Repair agency to think about recent clients who they thought would be suitable, willing, and available for volunteering. The Silverlinks project officer then sifted the list, and clients were contacted by letter and followed up by telephone. This had varying success in the different areas – it will depend on colleagues’ knowledge of their clients and the number of suitable candidates.

PROS:

- Provides a useful ready-made list of potential volunteers, who have had recent experience of repairs, adaptations or moving home;
- Useful if done in conjunction with caseworkers/staff, who have some knowledge about the potential volunteer's situation;
- Potential to reach older people who may not be actively seeking a volunteering role or haven't considered volunteering;
- Potential to reach older people who are less active, have mobility problems or are isolated but who can make a useful contribution;
- Likely to recruit people who have had experience with moving or adaptations.

CONS:

- If you "invite" people to become volunteers, it may turn out that they don't have the skillset you are looking for. It can then be tricky to turn them down if you need to do so;
- You will need to sift the list carefully to ensure you don't contact people who may be offended or may have some difficulties or recent experiences which might prevent them from volunteering;
- A service user may feel obliged to say yes if they feel that saying no will disadvantage them if they need your organisation's help in the future.

Recruiting from other groups, networks and events

Another way we recruited volunteers was to promote the project at events, and through existing and new networks, such as older people's forums, community groups, etc. Once you have recruited a few volunteers, if they are willing, they could accompany you to events or to visit older people's groups to share their own experiences of volunteering.

PROS:

- You will reach a wider pool of potential volunteers than simply recruiting service users;
- By speaking to groups or individuals, you will have a chance to explain more about the role than you can in a letter;

- A positive story from a volunteer is a great “advert” for your project.

CONS:

- Potential volunteers may not have any experience of moving home or carrying out adaptations;
- Identifying and attending events and contacting suitable organisations is very time consuming.

Advertising & using different media

You can also advertise volunteering opportunities in local newsletters, volunteering bureaux, websites, etc. A story about how your project is helping people featured in a local paper or on local radio is another way to reach potential volunteers and beneficiaries. Social networking is another tool which you could use, although perhaps more suited to promotional activities rather than for recruiting older people.

PROS:

- You will reach a wide range of people quickly;
- There are a large number of publications, websites, newsletters etc. where you will be able to advertise or place a story relatively easily at low cost or free.

CONS:

- You will have no prior knowledge of the person’s background, experience and skills of a person coming forward to volunteer so more time is needed to check and safeguard;
- It is likely to attract older people who are already actively seeking volunteering or already volunteering;
- You may need to pay to advertise in some publications or websites so you will need to build this into your budget.

Recruitment process

When you have identified people interested in volunteering, you’ll need to ask them to complete a simple application form, take up personal references and meet with them to make sure they understand the role, have the skillset you require and that the role will meet with their expectations.

It is important to appreciate that volunteering is a two way process and volunteers need to feel valued and useful and find the work stimulating and interesting or they can just walk away!

Don't forget:

- Check and keep to your organisation's volunteer policy. Most volunteer policies will require an application form, interview and references. Examples of forms, including a volunteer role description and application form are included in this guide.
- Safeguarding service users is extremely important.
- You may need to obtain Disclosure and Barring Service (DBS) checks for your volunteers according to your organisation's policy (this replaces the old CRB checks). However, advice given from the DBS for the pilot project was that the activity undertaken by our volunteers was not deemed to be "regulated activity" and therefore DBS checks were not needed. Nevertheless checks and balances do need to be in place to limit any risks.
- You may need to help people fill the application forms in – although they are straightforward, they can look quite daunting and can put off some potentially good volunteers.

TEMPLATES AND DOCUMENTS

- 2a. Example volunteer policy and agreement
- 2b. Volunteer role description
- 2c. Volunteer application form
- 2d. Reference request form
- 2e. Reference request letter
- 2f. Advert for volunteers, with role description
- 2g. DBS guidance on regulated activity

Volunteer training and induction

Volunteers will need some initial training before they begin their volunteering activities. Broadly, you will need to make sure your training covers:

- Explanation of the role, including what is expected of volunteers, and what volunteers can expect to get out of volunteering;
- Support - how volunteers will be supported; who to ask for help or to complain and what to do if things get difficult whilst volunteering;

- Boundaries – what level of support they are expected to give to a beneficiary, what's appropriate support and what's not;
- Safeguarding – this is extremely important and you should ensure that you cover this with both beneficiaries and volunteers. You can find some useful factsheets at www.ageuk.org.uk/health-wellbeing/relationships-and-family/protecting-yourself;
- You should also consider developing a risk assessment, eg for volunteers who are undertaking home visits;
- Equal opportunities, health & safety, lone working, and confidentiality.
- Practical things like recording hours, travel expenses, completing monitoring forms, etc.

You may also wish to cover training that is specific to the role or if a volunteer asks you for training in an area (e.g. listening skills, housing options).

Our pilot projects each approached volunteer training in different ways depending on what worked well for the volunteer group and the project officer. This included group training days and one-to-one training in the volunteer's home.

Group Induction Training

In Bristol, the approach was to carry out a two-day group training session for those interested in volunteering. At the end of the training, volunteers completed the volunteer application forms and this was followed up with an informal interview. This worked well in this instance and is a good way to get volunteers together for in-depth training and group discussion. It also helped to engender a group identity and contributed to the positive atmosphere that has developed at Bristol volunteer meetings. Group training is the most time effective if you have a good sized group of people, and you could condense the training to a one day session if appropriate.

However, if you do take this approach you will need to exercise caution as you risk wasting yours and the volunteers' time if, for example, the volunteer finds that the role doesn't meet with their expectations, or you can't obtain suitable or satisfactory references - as you will only find this out after the training. It will be difficult for both parties if a volunteer is not suitable for the role after they have spent time training. You can avoid this as much as possible by speaking to the volunteer and/or sending them relevant information prior to the training to make sure you are both happy with expectations.

The practical difficulty with this approach is finding a date (or dates) suitable for everyone - you may need to repeat some of the training – and it also assumes that all volunteers can get to a specific venue easily. However, at the start of a new initiative when a number of volunteers are starting at the same time it does have a useful place.

A sample agenda of the training sessions is included as part of this guide.

One to one training

You can also provide training on an individual basis, once the volunteer has sent in their application, been vetted, and you have references. This was the approach taken in Leeds and Manchester.

It is possible to combine your volunteer interview with basic induction training, allowing you to go through any individual concerns and get to know your volunteer and their relevant background/experiences in more depth. It is much more suited to those older people who cannot easily travel.

It will take some time to go through the relevant induction training with each volunteer individually, especially if you have a large number of volunteers. It also means that your volunteer may not meet any other volunteers. If part of their reason for volunteering is to have more social contact this is clearly a disadvantage. However, for individuals who do not like groups or are unable to travel, the one-to-one approach is obviously preferable.

As part of the pilot project, we found it useful to go through the main elements of the induction training with the volunteer, and leave them with a volunteer pack to read and digest in their own time. To be certain they have taken on board key policies, you could ask them to sign a form to say they have read and understood the volunteer pack, and send this in to you.

A sample of the contents of one of the volunteer packs is included as part of this guide.

Ongoing support, training and volunteer retention

It's important to keep your volunteers interested, motivated and engaged with the project. You can do this by maintaining regular contact and providing ongoing support, training, offering different activities for people to try, inviting volunteers to events or social activities, and keeping them up to date with news and developments.

Offering an ongoing group training is a good way to ensure your volunteers keep engaged with the project. It allows them time to meet together and/or with you, feel involved and gain additional skills/knowledge, and keep updated with news and developments. You could cover relevant topics not covered in depth during the initial volunteer training such as visiting a retirement housing scheme. Ask volunteers what they would like to learn - in Bristol, training sessions took place on the different services and support offered by Care & Repair and other relevant organisations e.g. talks from a Technical Officer or Handyperson about their role. You can also use any group sessions to gather feedback from volunteers about the role and the project – they are an excellent way to gather qualitative data about the project's impact on people's lives.

You may find that ongoing group training isn't practical (e.g. if your volunteers are not very able to get to a training session). If this is the case you might consider sending out a volunteers' newsletter to let them know what's going on in the project and give any updates or information they might need. At the very least a phone call is important to ensure that you stay in contact with your volunteers regularly to support them and so they can give you any feedback or discuss any concerns.

TEMPLATES AND DOCUMENTS : volunteer training materials & policy extracts

- 2h. Boundaries
- 2i. Equal opportunities
- 2j. Complaints and grievance procedure
- 2k. Health & Safety
- 2l. Lone Working
- 2m. Confidentiality
- 2n. Risk Assessment (for home visits)
- 2o. List of contents of training pack
- 2p. Sample agenda for training days
- 2q. Dos and Don'ts of peer support

SECTION 3. BENEFICIARIES

Finding the older people who need your service

Below are a few ideas as to who you can work with in order to reach those who would benefit most from Silverlinks and some suggestions of ideas for generating referrals.

Referrals from within your organisation

It's imperative that the staff and managers in your organisation are supportive of Silverlinks and understand how it benefits the older people it serves, and how it links in with other services offered by your organisation.

It is worth emphasising here that the Silverlinks volunteers are **not** a replacement for Housing Options Advisers or other caseworkers. The volunteers are there to provide a listening ear and provide space to enable the older person to make their decision. This is complementary to the other services offered by some HIAs and Age UKs, and will aid caseworkers who have a heavy workload. You will need to ensure that staff understand this and understand the relationship between the core work of your organisation and what Silverlinks is trying to achieve. The pilot project found that getting this message across to staff and encouraging them to remember to refer potential volunteers and beneficiaries was sometimes a challenge particularly in the early stages of the project.

Working with other organisations

Some other organisations will be well placed to refer beneficiaries to your project, especially those that visit older people in their own homes. You could form informal partnerships with these organisations. This is a good way of reaching older people who are more isolated or housebound.

These could include any organisation or service that comes into contact with older people - such as handyperson services, local older people's forums, community or faith groups. You can also link with those that deliver "meals on wheels" services, hospital discharge services, carers forums, and social workers. In Leeds, Silverlinks worked with several organisations who visit older people in their own homes – e.g. Red Cross Hospital Discharge Service and Leeds "Libraries at Home" – who were able to refer a number of older people to the Silverlinks project.

Events and talks

Some volunteers are confident about attending events and doing talks for small groups of older people, or attending group sessions to talk about Silverlinks. If some of your volunteers are happy to do this, it is a good way to promote Silverlinks and generate interest. Many of the volunteers are also able to talk to people on a one-to-one basis at events, such as "Older People's day" gatherings, offering them information and listening to their housing stories. See "*Promotion*" section below for further ideas about events and groups.

Challenges

Recruiting beneficiaries and obtaining referrals from any source can take time. We found during the pilot project that a lot of legwork and networking is needed to spread the word about the project and the service that it offers, and that finding beneficiaries will often take longer than you might expect.

Ideas & suggestions for generating beneficiary referrals:

- Arrange a briefing session to give a presentation about Silverlinks to colleagues, so that they understand the project, can voice any questions or concerns, and are aware of how it can help clients;
- Produce a flyer to circulate to colleagues – ask them to pin it to their desk as a reminder to refer clients to Silverlinks as appropriate – an example is provided;
- Keep staff updated - for example with an email newsletter, some case studies or good news stories of successful cases;
- Introduce volunteers to your colleagues when possible - this will help to remind staff about the project and how it fits with their work;

- Ask colleagues to take out Silverlinks information/flyers on their visits and ask clients, where appropriate, if they would like to speak to somebody who has dealt with a similar situation. This could work well with Housing Options service, Falls Prevention, Home from Hospital or home adaptations teams;
- Arrange for colleagues to send out Silverlinks flyers alongside other information already sent out to clients - such as Home from Hospital packs or Housing Options information;
- Speak to other organisations who work with older people – community groups, Alzheimers cafes, libraries, residents groups, faith organisations, council departments, housing scheme managers (see document below for some ideas). They may have events you could attend to meet their clients, or be able to tell older people they meet about the project, and/or distribute your leaflets to the older people they visit in their own homes;
- If your volunteers are willing to attend events, this is a good way of enabling them to meet other older people who may want to talk to someone about their housing situation. This could include handing out information, staffing a stand or table display, and talking to other attendees.

Matching volunteers and beneficiaries

Ideally, you will have a number of volunteers who have a variety of experience of possibly moving home, having adaptations done to their home, or have supported someone through a difficult time eg onset of disability. This means you should be able to match beneficiaries with someone who has been through a similar situation. This will not always be the case, but we would expect that your volunteers will all have some understanding of facing a time of crisis and having to make decisions about housing and care, so they will still be in a position to offer a listening ear and provide support to another older person.

The Beneficiary Recruitment Form can help you find out the beneficiary's circumstances so you can match them more accurately with a volunteer. You don't necessarily need to send the form to the beneficiary, you can complete it over the phone or when meeting the person.

When you are matching a beneficiary with a volunteer, you'll also need to match expectations. Bear in mind what level of support the beneficiary needs and what your volunteers can offer. For example, your volunteer may not be very mobile, but your beneficiary might need a volunteer to visit them in their home. A female beneficiary living on her own may not feel comfortable with a male volunteer who is unknown to her visiting her at home. If either person feels uncomfortable with home visits but would like a face to face meeting, you could facilitate a meeting at your office, or a community centre or local cafe.

Think about matching people from similar social, cultural and ethnic backgrounds, if this is important to your beneficiary or volunteer. Some people feel more at ease talking to someone who they feel is from a similar background and therefore will

have a better understanding their situation. You may also find that beneficiaries do not have English as a first language and if possible would prefer to speak to someone who speaks the same language as them.

Before you make a match, you'll need to contact or visit the beneficiary to establish the support they need, and contact the volunteer who you plan to match them with to talk through the situation. If a meeting is arranged, you may go along with the volunteer to introduce them – this depends upon the individuals concerned.

You should follow up the first contact with the volunteer and the beneficiary and ask for feedback on the visit, making sure any monitoring forms are completed (see *below*).

TEMPLATES AND DOCUMENTS

- 3a. Beneficiary recruitment flyer
- 3b. Reminder poster for staff
- 3c. Beneficiary application form

SECTION 4. PROMOTION

Promotion and networking are both key elements of the peer support project, in particular when recruiting beneficiaries. There are three broad audiences: volunteers; beneficiaries (individuals and groups) and organisations that can refer beneficiaries to Silverlinks.

A large amount of time during the pilot project was spent promoting the project to various groups, organisations, council departments, and services run by other organisations. A sample of some of the organisations that we contacted and met with is included in this guide.

Although you will spend a large amount of time visiting various individuals and groups, remember that it will take a while for the information to filter through and for people to start contacting or being referred to Silverlinks.

We produced leaflets to hand out to older people explaining about Silverlinks. These were handed out to individuals at events, left in places where older people had access to them, and distributed on our behalf by other organisations as appropriate (see “working with other organisations” above).

TEMPLATES AND DOCUMENTS

- 4a. Example list of organisations contacted and met with in one pilot location.
- 4b. Example list of publications where Silverlinks was promoted
- 4c. Silverlinks beneficiary leaflet

SECTION 5. MONITORING AND EVALUATION

In order to show whether your project is making the difference to people's lives that it set out to do, you need to collect information about the impact that your work is making.

'*Evaluation*' involves using monitoring data and other information to make judgments about how your programme is doing, such as whether you are meeting the targets that were set for outputs (e.g. number of people who have benefitted), and the outcomes i.e. the changes, benefits or other effects that happen to people as a result of the Silverlinks services and activities.

'*Monitoring*' is the collection of the information (data) needed to help you answer questions about the performance of your project, including its evaluation.

'*Quantitative Information or Data*' is given as numbers such as number of volunteers, number of beneficiaries, number of peer to peer advisers.

'*Qualitative information or Data*' is descriptive and presented in words. These could be case examples which illustrate an aspect of a service, quotes and comments from volunteers and beneficiaries about the change that involvement in the project means to them.

Evaluation provides you with evidence of the benefits of your work for potential funders, as well as lessons you can learn from when you come to develop future projects.

Want to understand more?

If you are new to ideas about evaluation and monitoring these are useful sources of information:

- **The Charities Evaluation Service** website www.ces-vol.org.uk offers straightforward explanations of key evaluation principles and concepts. They also offer training and consultancy.
- **The BIG Lottery** has a particular approach to measuring outcomes from the projects that it funds and they publish a free guide, '*Explaining the Difference your Project Makes*'
http://www.biglotteryfund.org.uk/er_eval_explaining_the_difference.pdf
- **See Appendix 5f** for a 'crib sheet' explaining the main terminology.

Being clear what you are setting out to do

The Silverlinks programme is funded by the Big Lottery which describes itself as 'an Outcomes funder', meaning it sets out the changes that it wants its programmes to achieve and funds the projects that can contribute to bringing about those changes.

Silverlinks is one of Big Lottery's '*Silver Dreams Fund*' projects. The funding Outcomes for Silver Dreams are:

1. *Increased resilience amongst older people to manage key transitions in their lives*
2. *Improved capacity of organisations working with older people to be able to deliver lasting change*
3. *Learning from the programme is used to inform the policy and practice of organisations working with older people.*

The overarching Aim of Silverlinks is that:

Vulnerable older people, who are facing life changing choices concerning their homes and living situations, will be enabled to make well informed decisions through help from their more active peers

The intended Outcomes of the Silverlinks programme are:

1. *Older people involved with the project feel better able and prepared to manage life changing transitions, particularly with regard to their housing and living situations*
2. *Organisations who provide older people with housing and care or related services incorporate later life housing options awareness raising, volunteering and self help by older people, into their local delivery models*
3. *Organisations working with older people change their policies and practice to incorporate housing and care options information and advice related provision based on the evidence and learning from the Silverlinks programme.*

Local Silverlinks projects are primarily involved in meeting the first Outcome. Projects therefore need to collect data (i.e. 'monitor') to show how their work meets this Outcome.

All projects have 'Output' targets and hence need to collect data about numbers of people helped, trained or advised.

The three indicators that the Silverlinks project monitoring system is set up to measure are:

1. *Number of older people taking part in project activities who report improved ability to plan for and manage changes to their housing and care situations*
2. *Number of vulnerable older people linked to older volunteers who feel more in control and better able to manage their housing and living situations*

3. Number of older people with increased knowledge and awareness of later life housing and care issues and options

All of the local monitoring systems are based on being able to measure these three indicators, and hence provide the data needed to evaluate performance.

A model evaluation framework is included in this pack.

Monitoring and Data Collection

There is always a balancing act between the amount of data that evaluators would like projects to collect in order to measure their effectiveness (usually more than local projects would want to record), and the minimum amount of information needed to measure outcomes.

For example, volunteers may feel that record keeping is an onerous task and it should be enough to just *'get on with it'*, but project managers realise that they can only sustain a project if they can demonstrate its benefits - this needs to be explained to everyone involved right at the start and every possible effort made to make the data collection as simple as possible.

As many organisations already have their own quantitative data collection and management systems it may be possible to amend this slightly to accommodate the quantitative information collection for a Silverlinks project, e.g. number of volunteers and beneficiaries and some basic information about them (such as age, gender).

To identify the impact on their lives you need to collect some more in-depth data - things such as the reason for requesting peer support, the outcome of the contact with the volunteer, how the beneficiary feels after the help, and what the volunteers gained from their involvement.

One way to measure change is “before” and “after” surveys or questionnaires.

Qualitative data can include things like people telling their own stories, letters from volunteers and beneficiaries, recording and documenting comments at focus groups, group or one to one interviews, films and photographs. Silverlinks has made extensive use of a blog which has really brought the whole programme to life - see <http://silverlinksprogramme.wordpress.com>.

Using Silverlinks Forms and Systems to collect & record monitoring data

Depending on the systems you currently work with (for example a CRM system or system such as Charity Log) you may be able to link your quantitative data recording with these in order to minimise duplication of data you already hold or collect. This may also enable you to monitor the number of beneficiaries / volunteers who use the other services offered by your organisation. Some modifications may need to be made to your systems to enable you to capture the data that you need.

If existing systems are not appropriate, a spreadsheet or simple database is the easiest way to record and manage quantitative data. Care & Repair England can advise on this.

Below are the main current documents for Data Collection.

EXAMPLE DOCUMENTS

- 5a. Volunteers details form
- 5b. Feedback questionnaire for volunteers
- 5c. Monitoring & Feedback form for older people who have been supported by a volunteer
- 5d. Silverlinks Workshop feedback form
- 5e. Postcard for collecting beneficiary data at events, talks etc.
- 5f. Volunteer diary
- 5g. Evaluation terminology
- 5h. Model evaluation framework

SECTION 6. SAMPLE DOCUMENTS AND TEMPLATES

- 1a. Silverlinks brochure

- 2a. Example volunteer policy and agreement
- 2b. Volunteer role description
- 2c. Volunteer application form
- 2d. Reference request form
- 2e. Reference request letter
- 2f. Advert for volunteers, with role description

- 2g. DBS guidance on regulated activity
- 2h. Boundaries
 - 2i. Equal opportunities
 - 2j. Complaints and grievance procedure
 - 2k. Health & Safety
 - 2l. Lone Working
 - 2m. Confidentiality
 - 2n. Risk Assessment (for home visits)
- 2o. List of contents of training pack
- 2p. Sample agenda for training days
- 2q. Dos and Don'ts of peer support

- 3a. Beneficiary recruitment flyer
- 3b. Reminder poster for staff
- 3c. Beneficiary application form

- 4a. Example list of organisations contacted and met with in one pilot location.
- 4b. Example list of publications where Silverlinks was promoted
- 4c. Silverlinks beneficiary leaflet
- 5a. Volunteers details form

- 5b. Feedback questionnaire for volunteers
- 5c. Monitoring & Feedback form for older people who have been supported by a volunteer
- 5d. Silverlinks Workshop feedback form
- 5e. Postcard for collecting beneficiary data at events, talks etc.
- 5f. Volunteer diary
- 5g. Evaluation terminology
- 5h. Model evaluation framework



Silverlinks: enabling older people to manage life changes.

Home is important.

It is the place we spend most time and can make all the difference to being able to live independently and well.

As we get older our home may not suit us as well as it used to. Using stairs or the bath can become a challenge. Illness or bereavement may prompt us to consider moving.

Talking to someone who has faced a similar situation can help. Knowing about possible options, such as adaptations or alternative housing, can enable us to make an informed decision.

This is why Care & Repair has set up the Silverlinks project ...

What will the Silverlinks project do?

- Silverlinks will link older people facing times of change or crisis with older volunteers who have already faced and dealt with a similar situation
- Silverlinks will provide older people with information about their housing and care options so that they can plan for the future

Silverlinks is about enabling mutual support during life's upheavals.

Who is it for?

An older person who is wondering how they are going to be able to manage in their current home can ask Care & Repair for advice, information and practical help e.g. with repairs, adaptations or how to find alternative housing.

As well as being offered detailed information and services, they will be given the option of talking to an older volunteer who has faced and resolved a similar situation. Volunteers will have personal experience of resolving housing dilemmas and will be trained to listen to and help other people reach their own decision.



What does it cost?

The information, advice and volunteer 'listening ear' is all free.

If someone decides that they need to adapt or repair their current home the Care & Repair service can help to organise this building work, including helping to find grants, loans or charitable money if paying is a problem. There may be a charge for the technical services.



Financial advice about moving home options can be provided, but the costs of moving home would have to be met by the person in most circumstances.

And there's more ...

As well as connecting older volunteers to people facing life changing housing decisions, Silverlinks will try out other initiatives.



Planning for the future

Silverlinks will help people think ahead by piloting pre-retirement 'housing options' training. It will also develop housing options workshops for older people, asking them to pass on what they learn to friends and acquaintances.

Mutual practical assistance

Silverlinks will try out a Skill Swap initiative to link older people together for mutual benefit eg. mowing the lawn in return for mending clothes.

Influencing decisions

Silverlinks will work with older people to enable them to have more influence over plans for their neighbourhoods in order to make them better places to live in later life, creating more 'Age Friendly' places.

Where?

The Silverlinks project is being tried out in Leeds, Manchester and Bristol.





What is Care & Repair?

Care & Repair England is an independent charitable organisation set up in 1986 to improve older people's housing. It innovates, develops, promotes and supports practical housing initiatives and policies which enable older people to live independently in their own homes for as long as they wish.

Local Care & Repair agencies in Leeds, Manchester and Bristol are all independent charities who offer services to people who need help to repair and adapt their homes, or who need impartial information and advice about housing and care options.

Are you an older person who wants to talk to someone about your housing situation?

Are you interested in volunteering to share your experience and to learn more about housing and care options in later life?

If you live in these areas you can contact your local Care & Repair Silverlinks organiser:



Care & Repair Leeds
Barbara Bailey
0113 2009157
barbara.bailey@care-repair-leeds.org.uk



Care & Repair Manchester
Karen Kennedy
0161 8741658
kkennedy@careandrepair-manchester.org.uk



West of England Care and Repair
Judy Mead
0117 9543923
judy.mead@wecareandrepair.org.uk

For general national information on the programme, contact email: sarahvernau@careandrepair-england.org.uk

Tel: 0115 9506500

Follow us on Twitter: @_Silverlinks

Follow our blog: www.silverlinksprogramme.wordpress.com

Silverlinks is funded by the Big Lottery Fund's Silver Dreams Fund, supported by the Daily Mail
Published 2012

Care & Repair England is an Industrial and Provident Society with Charitable Status Reg No 25121R

Appendix 2a. Example Volunteer Policy and Agreement (from Leeds Care & Repair)

Care & Repair Leeds Volunteer Policy

1 Introduction

- 1.1 Care & Repair Leeds is the Home Improvement Agency for Leeds. It is an independent agency with charitable status. The aim of the agency is to promote independent living for older people, adults and children with disabilities and people on low incomes. It achieves this by providing a wide range of cost effective, efficient, client-centred services, which are flexible and can be adapted to meet changing needs.
- 1.2 This policy covers the use of volunteers by Care & Repair Leeds. It includes the protection and support given to volunteers, the agreements that will be made with each volunteer, the responsibilities of the volunteers and the expenses that can be claimed by volunteers.

2 The Principles of the Policy

- 2.1 Care & Repair Leeds values the contributions made by volunteers, will treat the volunteers fairly, provide adequate information and support for the volunteers and provide out-of-pocket expenses for volunteers. There will be no legally binding contract between volunteers and Care & Repair Leeds and no employment relationship will be created.
- 2.2 The Volunteer role is a gift relationship, binding only in honour, trust and mutual understanding. No enforceable obligation, contractual or otherwise, can be imposed on Volunteers to attend, give or be set a minimum amount of time or carry out the tasks provided. Likewise Care & Repair Leeds cannot be compelled to provide regular work, payment or other benefit for any activity undertaken.
- 2.3 Volunteers are not to be used to replace paid workers. Volunteers will only be used to supplement the work of paid workers and not to substitute the work of paid workers.
- 2.4 Volunteers will be seen as representing Care & Repair Leeds to members of the public

3 Equal Opportunities

- 3.1 Care & Repair Leeds will aim to treat all volunteers in line with the agency's equal opportunities statement, which is as follows:
"Care & Repair (Leeds) recognises that Britain is a diverse society and believes that no person or group should suffer discrimination on the basis of race, colour, ethnic or national origin, creed, gender, class, visible or invisible disability, sexuality, unemployment, trade union activity, domestic responsibility, marital status, or age; it also supports the Rights of People with HIV and AIDS. Care & Repair (Leeds)

therefore declares its intention to work for the furtherance of equal treatment in employment, service delivery and committee representation.”

4 Information and Support

- 4.1 All volunteers will be given adequate information about the work carried out by Care & Repair Leeds and about the specific areas of volunteering that they will be involved in. Induction and training will be provided in order for the volunteer to carry out their role, and a record will be maintained of all induction, courses and training undertaken. Support to individual volunteers will be provided by a named member of staff.
- 4.2 If a volunteer has concerns about their volunteering or any dissatisfaction with their activities, they can discuss them with their named support worker, or, if this is not appropriate, with the Director of Care & Repair Leeds. The agency has a complaints policy, which can be accessed by any member of the public.
- 4.3 Volunteers will not be paid for the work they carry out. However, in all other respects volunteers are entitled to be treated on an equal basis with paid staff.

5 Volunteers Agreement

- 5.1 A volunteer’s agreement will be drawn up with each volunteer in order to establish mutual expectations. The agreement will include the expectation for volunteers to follow the agency’s policies and procedures (particularly equal opportunities, health and safety and confidentiality), and to meet mutually agreed time commitments. It will also include the commitment of the agency to provide relevant induction and training, the name of the support worker, the payment of out-of-pocket expenses, to provide adequate insurance cover and to implement good health and safety practices. This agreement will not form a legally binding contract between volunteers and Care & Repair Leeds and no employment relationship will be created.

6 Expenses

- 6.1 Volunteers will be able to claim out-of-pocket expenses in relation to their volunteering roles. They will be required to complete expenses claim forms and provide receipts for the expenses incurred wherever possible. These expenses can include travel to and from the place of volunteering, travel undertaken in the course of volunteering, meals and refreshments taken during the course of volunteering and any other legitimate expenses agreed in advance with staff from Care & Repair Leeds.
- 6.2 Care and Repair Leeds can pay up to the cost of a day rider bus fare or car travel within the boundaries of Leeds only.
- 6.3 Volunteer drivers will be eligible to claim tax-free approved mileage rates (for 2012/13 the figure is 40p per mile for cars and vans, 24p per mile for motorcycles and 20p per mile for bicycles). They must inform their vehicle insurers of their voluntary activities, but this should not result in an increase in

premiums. They will have to provide evidence of a current, valid driving licence and adequate insurance cover.

7 Health and Safety

- 7.1 Care & Repair Leeds has a duty of care towards volunteers. All volunteers will be given adequate information, training, the use of safety clothing or equipment and supervision in relation to their volunteering roles.
- 7.2 All volunteers are covered by the agency's insurance policies for personal accident, public liability and employer's liability. It is the duty of the Volunteer to ensure that they do not put themselves at risk at any point whilst performing duties whilst volunteering for Care & Repair.
- 7.3 All volunteers involved in visiting clients in their homes or escorting them on trips or activities will be subject to Criminal Records Bureau checks at the Standard Disclosure level. This will be arranged and funded by Care & Repair Leeds.
- 7.4 Volunteers who use their cars during the course of voluntary work must inform their insurance company that they are doing so. Volunteers should be aware that it is against the law to make or receive a telephone call on their mobile phones whilst driving.

8 Selection of Volunteers

- 8.1 The process of selecting volunteers will aim to ensure a good match between the volunteer and the volunteer role description. References will be taken. Volunteers will be required to complete a Volunteer Application Form.
- 8.2 For some Volunteer roles it will be necessary for an enhanced Disclosure and Barring Check to be carried out on the Volunteer. Volunteers will be informed if these checks need to be carried out.
- 8.3 Care & Repair Leeds reserves the right to determine that a prospective Volunteer may not be appropriate. However, every effort will be made to direct unsuccessful applicants to other Volunteering opportunities.
- 8.4 Successful applicants will be asked to agree to the terms of the Volunteer Agreement. The Volunteer Agreement is a document setting out the guidelines on mutually agreed undertakings between the Volunteer and the Care & Repair Leeds. This document is not to be interpreted as being any form of contract, has no legal status and is not legally binding.

9 Termination of Volunteer Role

- 9.1 The volunteering role will be terminated if the volunteer proves to be unsuitable, if the particular service ceases or if the volunteer wishes to withdraw their services.
- 9.2 The volunteer will have regular supervision with a named member of staff. This will allow any concerns within the volunteering role to be discussed, with

any expected improvements or changes as well as dates for this improvement to occur.

- 9.3 If no improvement is noted the volunteer will be given a final warning.
- 9.4 If no improvement is noted following the final warning the volunteer will be asked to leave. Care and Repair Leeds will provide information on other volunteering options within Leeds (i.e. The contact details of the Volunteer Centre Leeds) and if appropriate, will agree to provide references for the volunteer up to six months after leaving.
- 9.5 If the volunteer's behaviour contravenes Care and Repair Leeds policies on Safeguarding, Equal Opportunities, Health and Safety, Data Protection and Confidentiality then, dependant on the severity of the incident, Care and Repair Leeds may ask the volunteer to leave immediately.
- 9.6 Everyone has a moral duty and legal obligation to protect others from harm and risk. Care & Repair deals with vulnerable adults. Any concerns you may have about any of the Care & Repair users you may come into contact with must be referred to your designated member of staff.

10 Grievance Procedure

- 10.1 Any Volunteer has the right to complain if they are unhappy with their role or feel that they have not been treated fairly.

11 Gifts

- 11.1 Volunteers should not accept gifts or money from members of the public they come into contact during their volunteering role.

Care & Repair Leeds Volunteer Agreement

1 Introduction

- 1.1 This Volunteer Agreement describes the arrangement between Care & Repair Leeds and:

Name: [insert name of volunteer]

Address: [insert address of volunteer]

- 1.2 The volunteering role commences on: [insert date of commencement of role]

1.3 The volunteering role relates to: Silverlinks Peer Support

2 Responsibilities of Care & Repair Leeds

- 2.1 Care & Repair Leeds will provide induction and training appropriate to the volunteering role and provide a named member of staff to provide support, information and supervision
- 2.2 Volunteers will be able to claim out-of-pocket expenses in relation to their volunteering roles by completing an expenses claim form and providing receipts. These expenses can include travel to and from the place of volunteering, travel undertaken in the course of volunteering. Meals and refreshments (up to the value of £3.50) taken during the course of volunteering (if the period of time spent volunteering in a single day exceeds 4 hours) and any other legitimate expenses agreed in advance with staff from Care & Repair Leeds.
- 2.3 Care & Repair Leeds will ensure that the volunteer is covered by adequate insurance cover whilst undertaking voluntary work for the agency.

3 Responsibilities of the volunteer

- 3.1 The volunteer agrees to follow the agency's policies and procedures; maintain confidentiality in relation to the agency and its clients; and meet time commitments and give reasonable notice so that other arrangements can be made when this is not possible.
- 3.2 The volunteer agrees to references being taken and Criminal Records Bureau checks being made where necessary.

4 Status of Agreement

- 4.1 This agreement is binding in honour only, is not intended to be a legally binding contract between us and may be cancelled at any time at the discretion of either party. There is no intention to create an employment relationship between the volunteer and Care & Repair Leeds either now or at any time in the future.

Appendix 2b. Volunteer Role Description (example from West of England Care & Repair)

<p>Role title</p>	<p>Silverlinks Volunteer</p>
<p>Purpose of the role</p>	<p>WE Care & Repair (WEC&R) aims to enable older and disabled people to live independently in their own homes for as long as they wish or to move home if that is what they prefer.</p> <p>The Silverlinks project is all about mutual support during life's upheavals. A serious illness or the onset of disability or the death of a loved one, are often the triggers for making life changing decisions about having repairs or adaptations to the home or moving. However, all too often older people have neither the information they need about possible options, nor an impartial person whom they can talk to for support.</p> <p>This project will link older people facing such dilemmas with other older people who have similar personal experience, who would offer a listening ear, provide impartial information and, through WE Care & Repair, offer practical help. This will give older people a breathing space in which to make up their own minds and manage life changes better. It will also enable the volunteers to make good use of their knowledge and skills.</p> <p>The project will also be testing new ways of encouraging people to think and plan further ahead for their housing and care in later life in order to avoid such crises. It will make use of older people's personal experience to influence the design of homes and neighbourhoods that will better enable later life independent living.</p>
<p>What you will be doing</p>	<ul style="list-style-type: none"> • Being introduced or helping to find people (aged 50 and over) who are considering having adaptations or repairs done in their own home or who are considering moving home. And then with them: <ul style="list-style-type: none"> ○ Sharing some of your own experiences of having repairs, adaptations or moving house with others. ○ Listening to their needs and any concerns they may have. ○ Re-assuring people who may be worried about having adaptations, repairs or moving home. ○ Completing simple questionnaires (so we can see if the project is working well) and returning these to or phoning the answers through to the project officer. ○ Giving out WEC&R leaflets & promotional materials. ○ Providing impartial information to our clients.

<p>will need</p>	<p>objectives of WEC&R, and especially our repairs, adaptations, handy person and technical services.</p> <ul style="list-style-type: none"> • Be willing to promote the work of WEC&R. • Attending or receive training sessions and occasional volunteer meetings and staff meetings where necessary (and if you are able to) • Adhere to all WEC&R policies and procedures, such as Confidentiality, Health and Safety and Equal Opportunities.
<p>When and where ?</p>	<p>The role could be carried out in one or more locations:</p> <ul style="list-style-type: none"> • typically at community groups or organisations within your local area <p>or</p> <ul style="list-style-type: none"> • by telephone from home, or at our Waterloo Centre in Bristol. • You can decide how much of your time to give and how often. • You would be free to leave your role as a volunteer at any time but we would hope that you could stay in the role for at least 3 months so that you and the Silverlinks Project will get the most out of the experience. • We expect that on any one day we would be asking you to give between 1 and 3 hours of your time. • You may wish to volunteer to help another person on a once-only basis or you may give that person on-going support (but with an agreement about when your support will end).

Support offered**Access needs:**

Please let us know if you would need help with anything to enable you to volunteer, such as:

- help with transport
- an interpreter
- a translator
- any other access needs
-

Induction

We ask all volunteers to attend a course spread over 3 sessions to introduce you to WE Care & Repair and the Silverlinks Project. Please see the separate document, "Volunteer Induction Programme" to see what the course will cover.

If you are unable to do this, we will offer training to you in your own home.

Training

We will offer training at WEC&R to you that is necessary to carry out your role and offer you training from other organisations as appropriate.

Supervision & support

We will ask volunteers to agree to be regularly supervised & supported by the project development worker.

Expenses

WEC&R will cover the cost of your lunch (up to £4.50) if you are volunteering with us for most of a day. Receipts are required for all expenses claims.

Travel expenses / parking fees will be paid – but need to be agreed in advance with the project development worker.

If you use your own car we will pay you 45p per mile for journeys necessary to carry out the role.

We have a pool car that may be used by a volunteer to carry out your role.

Telephone expenses – we can pay these – you will need to keep a note of how much these are.

Insurance cover

WEC&R has insurance cover for volunteers using our pool cars. Volunteers are also covered for other activities by WEC&R's employer's liability insurance.

<p>What you could get out of it</p>	<p>We hope that you will:</p> <ul style="list-style-type: none"> • Feel that you are providing a useful service to older or disabled people. • Feel more confident about helping and advising others. • Learn new skills and new useful information to enable you to do this role. • Meet new people with whom you may share common experiences. • Learn about other organisations that help people in Bristol. • Enjoy sharing your personal experiences for the benefit of others. • Become part of our very well established and highly praised / award-winning organisation
<p>Other relevant information</p>	<ul style="list-style-type: none"> • You may be asked to complete a CRB (criminal records bureau check) depending on your level of involvement. • If you are offering to drive people in your own car we will need to see your driving licence and up to date insurance. • If you are offering to drive people using our pool car we will need to see your driving licence. • If you are offering to drive other people on our behalf, we may need to ask you to show us proof that you have told the DVLA or your car insurance company about any medical conditions that you have (if applicable). • We will ask you to complete a short application form • We will ask you for two references from someone who knows you well. • We may invite you or visit you for an informal interview.

Appendix 2c. Volunteer Application Form (Care & Repair Leeds)

Peer Support Application Form

All information on this application form will be treated in the strictest of confidence.
Please send completed application forms to Barbara Bailey, Silverlinks Project
Development Officer, Care & Repair Leeds, 323 Roundhay Road, Leeds LS8 4HT

Name:

Address:

Postcode:

Telephone number: Home:

Work:

Mobile:

Email address:

Employment status:

Employed Retired Unemployed Other

Please tick the relevant boxes below to indicate your availability to volunteer.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Which times of day would you be available to volunteer?

Have you used the services of Care & Repair? If so, which service did you benefit from?

What support and assistance are you able to offer someone experiencing issues around housing?

Please could you provide contact details for two people who could provide a character reference. Members of your family cannot be referees.

Reference 1

Name:

Address:

Postcode:

Tel Number / Mobile:

Email:

Reference 2:

Name:

Address:

Postcode:

Tel Number / Mobile:

Email:

Declaration

I declare that the details entered on this form are, to the best of my knowledge, true. I understand that the information provided will be treated as confidential and only disclosed to relevant projects with my consent.

I understand that upon receipt of this application Care & Repair, Leeds reserves the right to accept or refuse it. I understand that Care & Repair, Leeds reserves the right at any part of the recruitment process, including interview and training, to determine the suitability of the applicant – and as such I may not be chosen to become a mentor. If it is required, I agree to an enhanced Disclosure and Barring Check (DBS) being undertaken.

Signature: _____ Date: _____

Appendix 2d. Reference Request Form (from Care & Repair Leeds)

Volunteer Reference Form

Applicant's name: [insert name of volunteer]

Volunteering role applied for: Silverlinks Peer Support volunteer

In what capacity is the person known to you?

How long have you known the person?

Please select and tick:

Performance and Personal Attributes	Poor	Acceptable	Good	Excellent
Reliability and trustworthiness				
Relationships with friends or colleagues				
Initiative				
Time keeping				
Other Comments				

NAME: _____

SIGNATURE: _____

DATE: _____

Appendix 2e. Reference Request Letter (from Care & Repair Leeds)

Dear [insert the name of referee]

Re: [insert name of volunteer]

We have received an application from the above to become a volunteer at Care & Repair Leeds as a Peer Support volunteer for the Silverlinks Project. [insert name] has given your name as a referee.

I have attached a copy of the role description and person specification for the volunteer position applied. I am also enclosing a brief description of the Silverlinks Project.

I would be grateful if you could complete the attached reference form for [name] and return it to Care & Repair Leeds in the pre paid envelope provided. If you have any questions, please do not hesitate to contact me on (0113) 200 9157.

Thank you for your co-operation in this matter.

Yours sincerely

Barbara Bailey

Silverlinks Project Development Officer

Encs



Can you help another older person?

The Silverlinks project is all about mutual support during life's upheavals, such as when someone is thinking about having house repairs or adaptations or moving house.

- ◆ **Are you aged 50+ with personal experience of having your own home adapted or repaired?**

Or have you moved house?

- ◆ **Could you volunteer to support others who are thinking of making similar changes?**
- ◆ **Can you put us in touch with people who would benefit from this free service?**

As a volunteer you will make good use of your experience by:

- **Offering a listening ear to people who are thinking of having repairs or adaptations or moving house.**
- **Providing impartial information**
- **Telling other people about the help & services available from WE Care & Repair**
- **You would help other people either by talking with them over the telephone.**
- **Or by meeting them at our Waterloo Centre at our offices in Bristol.**
- **Or by meeting them at a place which you and the other person are both happy with – e.g. at a community centre, village hall, lunch club, social club etc.**
- **You will help older people find a breathing space in which to make up their own minds and manage life changes more easily.**



In association with
Daily Mail

Interested? Please contact Judy Mead

0117 954 22 22 or 0300 323 0700

Email: judy.mead@wecareandrepair.org.uk

Appendix 2g. DBS Guidance on Regulated Activity



Regulated activity – adults

The Protection of Freedoms Act 2012 amends the definition of regulated activity relating to adults from 10 September.

This is a summary of the key changes to regulated activity relating to adults.

For further information please see the [Department of Health website](#).

What has changed?

There are now only six types of activity which can be classed as regulated activity relating to adults

- healthcare for adults provided by, or under the direction or supervision of a regulated health care professional
- personal care for adults involving hand-on physical assistance with washing and dressing, eating, drinking and toileting; prompting and supervising an adult with any of these tasks because of their age, illness or disability; or teaching someone to do one of these tasks
- social work - provision by a social care worker of social work which is required in connection with any health services or social services
- assistance with an adult's cash, bills or shopping because of their age, illness or disability arranged via a third party
- assisting in the conduct of an adult's own affairs under a formal appointment
- conveying adults for reasons of age, illness or disability to, from, or between places, where they receive healthcare, personal care or social work arranged via a third party

Other changes include:

- the new definition no longer refers to the word "vulnerable" for regulated activity relating to adults
- the specified establishment (a care home) has been removed – the focus is on the activities needed by the adult, not where the activity takes place
- the frequency test has been removed – an individual only needs to engage in the activities listed below once to be carrying out regulated activity relating to adults

The definition focuses on those activities which, should they be needed by any adult, mean that an adult is considered vulnerable at the point of receiving them.

What is not changing?

- an adult is defined as a person aged 18 years or over
- a person whose role includes the day-to-day management or supervision of any person engaging in regulated activity, is also in regulated activity
- regulated activity relating to adults excludes any activity carried out in the course of family relationships, and personal, non-commercial relationships

The definition of regulated activity relating to adults is detailed in [Part V of the Protection of Freedoms Act 2012](#)

Appendix 2h. Extract from Training Materials on Boundaries (example from West of England Care & Repair)

Boundaries are about guidelines, rules or limits that are reasonable, safe and permissible ways for people to behave. It is also about how we respond when someone steps outside those limits.

Why have boundaries?

- ◆ to protect vulnerable clients from relationships with staff members and volunteers which may have exploitative or damaging aspects, or from situations where the worker may be subject to a conflict of interests, with implications for their relationship with the a client.
- ◆ to protect the privacy and well-being of staff and volunteers, by giving them clear guidance regarding the setting and maintaining of role boundaries.

Potential Boundary Issues

- 1. Personal Friendships**
- 2. Sexual Relationships**
- 3. Financial Transactions**
- 4. Gifts, Favours and Hospitality**
- 5. Clients' Assumptions** about what is being offered
- 6. Divulging Personal Information**
- 7. Receiving Confidential Information**
- 7. Dependence**
- 8. Recognition of Workers' Own Limitations**
- 9. Limitations of the Supportive Role**
- 10. Workers' Conduct**
- 11. Physical Contact**

Appendix 2i. Example Equality and Diversity Policy (example from Care & Repair Leeds)

EQUALITY AND DIVERSITY POLICY

STATEMENT

Care & Repair (Leeds) is committed to the principles of equal opportunities. The aim of our Equality and Diversity Policy is to ensure that no individual is treated less favourably than another, either in employment, service delivery or committee representation on the basis of their: -

Race, gender, colour, ethnic or national origin, religion, beliefs, disability, age, sexual orientation, marital status, parental status, domestic circumstances, class, HIV status, trade union activity, political beliefs, health, or working hours.

Care & Repair (Leeds) will endeavour to identify and eliminate any unreasonable or unfair treatment, which places people at a disadvantage that may prohibit them from receiving services or obtaining employment within the agency.

This statement relates to everyone who is in contact with Care & Repair (Leeds) and includes: management committee members, staff and clients.

RESPONSIBILITY FOR IMPLEMENTATION

The Management Committee of Care and Repair (Leeds) has ultimate accountability for this policy. However it is the responsibility of the Director of Care & Repair (Leeds) to implement, monitor and evaluate the policy and its delivery.

POLICY IMPLEMENTATION STRUCTURE

Care and Repair (Leeds) understands the importance of equal opportunities in relation to the effectiveness of the organization and has in place a range of policies and procedures, which should be used in conjunction with the Equality and Diversity policy.

These policies and procedures can be found in the Staff Handbook and Agency Policies Documents. All committee members and staff will be issued with the staff Handbook and Agency policy documents upon appointment and updated as and when necessary. Contractors will also be given a copy of the Equality and Diversity policy.

The Policy Statement shall be displayed in our office, so it is visible and accessible to staff and visitors.

The Director is responsible for ensuring that the Management Committee is kept informed of the policy implementation and any implications arising from and decisions relating to the policy.

STAFF OBLIGATIONS

All Staff has a responsibility for their own behaviour and to treat everyone with respect and challenge any discrimination of which they become aware. All staff should be familiar with the Equality and Diversity policy and be committed to its implementation.

SERVICE DELIVERY

- Care & Repair (Leeds) seeks to ensure and make reasonable attempts to making its services accessible to all sections of the community.
- Care & Repair (Leeds) will endeavour to take all necessary measures to conduct its activities in premises that are accessible to disabled people.

PROCEDURE FOR DEALING WITH COMPLAINTS OF DISCRIMINATION

Our grievance and disciplinary procedures, which can be found in the agency's Policy Handbook, will be used to deal with any complaints related to staff. Our Complaints policy will be used to deal with complaints about our service delivery.

MONITORING AND REVIEW

Care & Repair (Leeds) may ask clients using the services, job applicants, volunteers and trustees for information about their ethnic origin, disability, marital status, age or other personal information but will only do this for a specific defined purpose such as collecting statistical data for funders, for research or for own monitoring to evaluate it's policy's impact. If anyone does not want to provide this information, this will not affect their right to apply for positions within Care & Repair and they will be treated as fairly as the next person.

Care & Repair (Leeds) will seek to stay informed of any developments in Equality and Diversity practice and review in line with the Agency's policy review procedures.

HARASSMENT AND BULLYING

The organisation aims to promote the respectful treatment of individuals and protection from bullying, victimisation, and harassment of any nature in the working environment. As an equal opportunities employer Care & Repair (Leeds) is an organization where we provide an environment whereby, individuals have the right to be treated with respect, dignity and consideration.

Harassment is unwanted conduct directed towards an employee by another employee, which can be related to age, sex, race, disability, religion, sexual orientation, nationality or of a sexual nature that maybe regarded as unwelcome and offensive.

Any reported cases of harassment or bullying will be dealt with under the disciplinary procedures policy.

Appendix 2j. Complaints and Grievance Procedure (example from Care & Repair Leeds)

1. Introduction
 - 1.1 It is important that any problems or complaints that relate to your volunteering role are dealt with fairly, openly and consistently. We have therefore put the following procedure in place.
2. If a volunteer has a complaint about Care & Repair Leeds, a member of staff or another volunteer:
 - 2.1 You should initially discuss any issues relating to your volunteering role with the named member of staff who you report to. They will be in the best position to respond to most complaints.
 - 2.2 If the matter is unresolved or the complaint is against that named member of staff, then the volunteer should request a meeting with the Principal Officer who line manages the member of staff.
 - 2.3 If the matter is still not resolved then the dispute will be taken to the Chief Executive Officer of Care & Repair.
3. If there is a problem with the volunteer's behaviour:
 - 3.1 The aim would be to resolve any problems informally
 - 3.2 Where informal measures are not enough, the matter will be raised in a formal meeting with the volunteer. The volunteer will be entitled to put their case. If it is felt necessary an informal warning may be issued with steps agreed to improve conduct
 - 3.3 If the issues are not resolved a meeting will be called involving the volunteer, the appropriate member of staff and the Chief Executive Officer. This may result in a formal warning with the understanding that another warning would result in the volunteer be asked to leave the Care & Repair Leeds volunteer programme
 - 3.4 If a volunteer is believed to have behaved in a manner that has or could seriously affect Care & Repair Leeds – for example, theft, bullying or violence – they will be immediately suspended while the matter is investigated.

In all cases volunteers have the right to be accompanied at meetings on these issues by a volunteer, member of staff or friend.

Appendix 2k. Health & Safety Policy Extract (Example from West of England Care & Repair. A full example policy is also available)

WE Care & Repair (WEC&R) believes that excellence in the management of health and safety is an essential element within its overall business plan – a good health and safety record goes hand in hand with high productivity and quality standards.

People are the most important asset to WEC&R, and therefore we are totally committed to ensuring their health, safety and welfare at all times.

Our general intentions are:-

- To provide adequate control of the Health and Safety risks arising from our work activities
- To provide and maintain safe plant and equipment
- To ensure safe handling and use of substances
- To provide information, instruction and supervision for volunteers
- To ensure all volunteers are able to do their tasks, and to give them adequate training
- To prevent accidents and cases of work related ill health
- To maintain safe and healthy working conditions

You are asked to:

- Co-operate with supervisors and managers on health and safety matters
- Not interfere with anything provided to safeguard your health safety
- Take reasonable care of the health and safety of yourself and others
- Report all health and safety concerns to a responsible person

Appendix 2I. Lone Working Policy (example from Care & Repair Leeds)

LONE WORKING POLICY

Care and Repair is committed to ensuring the safety of its employees throughout their working day. Care and Repair recognise that the nature of the work of the agency requires some staff to work, alone which involves an element of managed risk. The agency will pursue a policy of eliminating these risks, and where this is not possible, the risks will be minimised so far as is reasonably practicable and managed, by:

- Complying with the relevant requirements of health and safety legislation and codes of practice
- Assessing the risk of current and future activities involving lone working
- Continuously seeking to reduce the risks and improve the management of risk when lone working
- Raising awareness, encouraging participation and training employees about minimising risk when lone working
- Setting out robust and clear procedural guidelines for staff engaged in lone working and their managers

This policy will be reviewed in line with the Agency's policy review procedures.

Risk Assessment

- 1.1** Where possible clients will be risk assessed prior to the first visit
 - i. Ideally a risk assessment of the client will be carried out prior to the first visit
 - ii. If this is not possible, a risk assessment must be carried out during the first visit
 - iii. Risk assessments for longer-term clients should be updated periodically or when circumstances change when advised by the client's professional worker.
- 1.2** Where possible properties will be risk assessed prior to the first visit
 - i. Ideally a risk assessment of the property will be carried out prior to the first visit
 - ii. If this is not possible, a risk assessment on the safety of the property must be carried out during the first visit
 - iii. Risk assessments of the properties of longer term clients should be updated periodically or when circumstances change
- 1.3** We will seek advice from other professionals involved with clients and their properties (and relatives, friends and pets) when assessing for risk
 - i. Information and advice about potential risks will always be sought from other professionals involved with the clients
 - ii. this will include enquiring about risks from the clients themselves
 - iii. about any relatives living with or visiting clients

- iv. about the state and safety of the property
- v. and asking about any dangers from pets they may own

Risk Reduction

1.4 We acknowledge that in order to carry out our work effectively and efficiently it is practical to visit clients alone, therefore;

- i. When planning to visit a client alone, particularly for the first time, the member of staff will always assess if the visit is necessary
- ii. If any significant risk has been identified or if we feel uncomfortable alone for any reason we will inform our line manager and appropriate action will be taken
- iii. If a staff member has a 'gut' feeling prior to visiting a client that indicates that they should not do so they may arrange a joint visit with another worker. This action may include carrying out joint visits or requesting the presence of another relevant professional.

1.5 All staff who carry out lone working will be provided with payment for mobile phone use or a pre-pay mobile phone.

1.6 All staff who carry out lone working will be provided with personal safety alarms

Risk relating to the collection of money

1.7 We will keep the amount of cash carried to an absolute minimum at all times

- i. We will only take cash payment for services from clients when absolutely necessary
- ii. We will encourage clients to pay by cheque or direct debit wherever possible

1.8 We will always follow the money handling guidelines when collecting payments from clients

1.9. Lone Working Procedure

1.9.1 Staff must endeavour to carry out a risk assessment on the client and their property prior to the first visit

1.9.2 If there has been any risk identified this should be discussed with their line manager prior to arranging the visit and appropriate action will be decided upon

1.9.3 If necessary joint visits will be planned, either with a co-worker or a member of staff from another agency (this may be actioned purely on the basis of a member of staff having a 'gut' feeling)

- 1.9.4** Prior to visiting a client it is imperative that the client's details are logged in the FEMIS system (and updated whenever necessary)
- 1.9.5** Before any visit the staff member must write the clients surname and address on the white board in their section (if more than one client is being visited in succession all names should be listed in order of visits) and their expected return time
- 1.9.6** If staff attend a visit and there is someone there who they are not expecting to be there they may terminate the visit and rearrange
- 1.9.7** During the visit staff must continue to monitor and assess for any risks
- 1.9.8** If an imminent risk is identified staff will take appropriate action. If the risk is significant, this may include phoning the office on the emergency line (a dedicated mobile phone in the office with staff cover during office hours – see 12 below), their line manager, the director or the police if necessary; or in termination of the visit
- 1.9.9** If staff feel at risk for any reason or have a 'gut' feeling that indicates they should do so, they may terminate the visit at any time
- 1.9.10** If a member of staff is running more than 30 minutes late or their visit plan changes they must phone in to the office to inform of this
- 1.9.11** If a member of staff finishes their visits and will not be returning to the office they must phone in to inform of this or use a 'buddy' system if the office is not open at that time
- 1.9.12** Emergency Telephone: A dedicated mobile phone will be maintained in the office and be covered by staff from 9:00am to 5:00pm. This will be for emergencies only and all staff who are responsible for answering it will receive training on the appropriate response. It is anticipated that this response will be to alert the police that a member of staff is in extreme danger at the address. All staff who are involved with visiting clients will have the emergency number as a speed dial in their mobile phones.

Appendix 2m. Confidentiality Agreement for Volunteers (example agreement from West of England Care & Repair)

Confidentiality Agreement

I agree to abide to the terms of this confidentiality agreement, both during the time of your involvement with the Silverlinks project and after it has ended.

I agree that I will:

- Keep any information shared between myself and a beneficiary confidential other than when you need to share information with WE Care and Repair workers.
- Immediately pass on any information which makes me concerned about the personal safety of either the beneficiary or another individual, to the Silverlinks Project Development Officer or in their absence to a Senior Manager at WE Care and Repair.
- Maintain confidentiality about all personal issues discussed both during the relationship and also once it has ended.
- Ensure that I will be aware and responsive to the personal safety and well-being of all individuals who are involved in the Silverlinks project.
- Understand that if I choose to stand down from my volunteer role I am still expected to keep all shared information confidential at all times and must never discuss the details of any volunteering relationship in which I have been involved.
- In order to protect anonymity and confidentiality about personal circumstances, not refer to any beneficiaries by name or otherwise identify them with anyone else other than the Silverlinks Project Development Officer.

Name..... Signed..... (Volunteer)

Signed.....(Silverlinks Development Worker)

Date

Appendix 2o. List of Contents of Training Pack (Example from West of England Care & Repair)



Silverlinks Volunteer TRAINING PACK

List of documents:

1. Volunteering with WECR
2. WECR expectations of volunteers
3. Silverlinks - can you help another older person ?
4. Role Description (role of volunteer)

1. Who can use WE Care & Repair's services and How to refer someone to WECR.
2. What can you refer someone to WE Care & Repair for help with?
3. How will you get or find people to support?
4. Please help find beneficiaries for Silverlinks
5. Active Listening
6. Do's and Don'ts
7. Helping at the Waterloo Home Design Centre
8. OT (Occupational Therapist) appointments
9. If someone is thinking about moving home part 1 – your role as a volunteer
10. If someone is thinking about moving home part 2 – Staying put & options for moving
11. Support and training for you as a Silverlinks volunteer

1. Recording your activities as a volunteer (monitoring)
2. Volunteering diary
3. Monitoring forms one, two, three and four

1. Boundaries – potential issues
2. Boundaries – full WECR policy
3. Confidentiality - policy extract
4. Equalities and Diversity - policy extract
5. Health & Safety - policy extract
6. Lone working - policy extract
7. Safeguarding adults – policy extract
8. Child protection - policy extract

1. Volunteer Application form
2. Volunteer agreement
3. Confidentiality agreement
4. Health Audit
5. Expenses form
6. Photographic & filming permission sheet
7. Induction programme
8. WECR leaflets & Waterloo Home Design Centre catalogue
9. Silverlinks – Care & Repair England leaflet
10. Silverlinks – WE Care & Repair leaflet/s

Appendix 2p. Sample agenda from volunteer training session



Session 1

11:00am – 1.00pm

- Welcome & introductions - do I want to become a volunteer?
- Silverlinks – What's it about? Who's funding it? How long is it running? How is WE Care & Repair recruiting volunteers and finding beneficiaries?
- What sort of things would I be asked to do as a Silverlinks volunteer?
 - What it is and is not – Do's and Don'ts
 - Questions / concerns
- What's in it for you?
- WE Care & Repair's services - by Lindsay Hay – Service Manager

1:00 – 2:00pm – LUNCH (provided free of charge) & chance to get to know each other

2:00 pm – 4:00pm

- Tour of the Waterloo Centre (at our offices)
- Keeping this confidential - for me and for the people I'd be helping
- Recognising, valuing and taking account of people's different backgrounds
- Support offered to volunteers by WE Care & Repair
- Claiming travel expenses for today

Both training sessions will be held at our accessible offices at:

WE Care & Repair, 5 Hide Market, Waterloo Road, Bristol, BS2 0BH.

Please see the enclosed map and travel information

Session 2

11:00am – 1.00pm

- Welcome and introductions
- Healthy Homes by Lindsay Hay – Service Manager
- Working from home as a volunteer – e.g. by telephone
- Working on your own in the community or working at our offices
- Boundaries – what do we mean and why is it important?

1:00 – 2:00pm – LUNCH (provided free of charge) & chance to get to know each other

2:00 pm – 4:00pm

- Health & safety – by Dave Masters – Service Manager
- How do I raise any concerns I may have about the people I'd be helping ? - safeguarding adults and child protection.
- What information would I need to collect about the people I'd help?
- **If I still want to volunteer – what happens next?**
 - Application form for Silverlinks & any help needed to complete it.
 - Arranging dates to have one-to-one informal interview and an induction with Judy, and explaining about CRB checks and Identification Cards.
 - Is there any other training you would like?
- Claiming travel expenses for today.

Both training sessions will be held at our accessible offices at:

WE Care & Repair, 5 Hide Market, Waterloo Road, Bristol, BS2 0BH.

Please see the enclosed map and travel and bus information

Appendix 2q. Do's and Don'ts of peer support (example from West of England Care & Repair)

The Do's and Don'ts of supporting a Silverlinks beneficiary

Do's

- Do share experience of your successes with having repairs, adaptations, handy person work, or having move home
- Do be prepared to listen and let the person talk about anything they want to.
- Do observe confidentiality at all times but if you are told something that means you are concerned for an adults or child's safety or well-being, then you must let Judy Mead know, or in her absence any other member of WECR staff)
- Do be helpful and sensitive, positive and encouraging
- Do inform Judy Mead or in her absence any other member of WECR staff of any concerns you have about a beneficiary's health or behavior.
- Do respect the client as an individual
- Do facilitate decision-making by making suggestions based on personal experience.
- Do listen confidentially to issues worrying the beneficiary.
- Tell the beneficiary about WE Care & Repair or any other services you think might help them.
- Refer the beneficiary to WE Care and Repair workers if you don't know the answer to any questions you are asked.
- Ask if the beneficiary would like you to phone them again and agree when this will be (e.g. in a week's time)

Don'ts

- Don't create any form of dependency
- Don't give out your personal information/contact details

- Don't give specific technical or practical advice (but do refer to WE Care and Repair for this).
- Don't intrude into areas that older person may wish to keep private
- Don't assume that what worked for you will work for everyone !
- Don't interrupt
- Don't impose your own views, values or solutions
- Don't give any advice around any financial issues
- Don't accept money from clients
- Don't become involved in family disputes or personal affairs
- Don't enforce your own religious or political opinions on a person
- Don't give your personal contact details to the client unless discussed first with the Silverlinks development worker

If you are visiting someone in their own home

- Don't administer medication
- Don't undertake any form of personal care e.g. toileting, washing, dressing
- Don't lift or move heavy objects

3a. Beneficiary recruitment flyer

Wondering whether to stay put or move home?

Would you like to talk to someone who understands?

Silverlinks can put older people in touch with an older volunteer who will:

- offer a listening ear and share their experiences
- provide impartial information
- explain the practical help available
- help you to make the decision that's right for you



If you would like to be put in touch with a volunteer, please contact Barbara Bailey on 0113 2009157



In association with
Daily Mail

3b. Reminder poster for staff (from West of England Care & Repair)

Please help me find beneficiaries for Silverlinks ! (aged 50+)

Do you know anyone aged over 50 who may benefit from being able to talk with or meet up with someone who has had personal experience of having their house repaired, adapted or who has moved home?

examples of possible beneficiaries – someone who:

- ◆ now lives alone (following a bereavement or divorce etc) found themselves responsible for getting house repairs or adaptations done ?
- ◆ is wondering about whether or not to move home ?
- ◆ has become more physically or mentally impaired through ill-health or old age who may be struggling to get in and out of their home, or finding it harder to get in and out of the bath, use the kitchen, get up the stairs etc.
- ◆ is unsure about whether they can cope with having any changes or building work done to make their home more accessible ?
- ◆ wants some re-assurance or advice about what their options are and wants to chat with someone who has used WE Care and Repair's Services
- ◆ has caring responsibilities and knows that some repairs or adaptations are needed but feels overwhelmed by trying to deal with this
- ◆ is close to retirement and would benefit from hearing about what housing options/repairs/adaptations are available and what help is available
- ◆ is worried about the costs of repairs or adaptations but may not be aware that they may be able to apply for a grant or loan or get other financial help?
- ◆ might like to visit our Waterloo Home Design Centre showroom and be accompanied by a volunteer with personal experience to have a look at stairlifts, level access showers, kitchens, bath aids, through floor lifts, aids to get in and out of bed and smaller pieces of equipment.

Please get in touch with me if you know someone who you think may benefit from talking to someone with personal experience of having their house repaired, adapted or who has moved home?

Appendix 2c. Beneficiary application form



BENEFICIARY APPLICATION FORM

Name:

Address:

Postcode:

Telephone:

Mobile:

Email:

Present circumstances:

Issues to discuss with volunteer:

Appendix 4a. Sample list of organisations spoken to, to promote Silverlinks in Leeds:

- Neighbourhood Network Schemes
- District Nurses
- Social Workers
- Community Matrons
- Physiotherapists
- Older People's Wards at Chapel Allerton & St James' hospitals
- Health Visitors
- Long Term Conditions, St Mary's Hospital
- Leeds Tenants Association
- Leeds & Yorkshire Housing Association
- Red Cross Home from Hospital scheme
- Disability Forum
- LCC Sheltered Housing wardens;
- Physical Sensory Impairment network
- Age UK Leeds
- Leeds Older People's Forum
- Health For All
- Leeds Irish Health & Homes
- Leeds Improving People
- All residential homes and sheltered housing complexes in Leeds
- Parish Councils
- GP surgeries
- All churches in Leeds
- Library At Home Service
- Community Meals
- One Stop Centres
- Carers
- Grandparents Association
- Creative Calverley
- Hospital discharge patients
- Feel Good Factor
- Healthy Living Network
- Leeds Irish Health & Homes
- Leeds Improving People
- William Merritt Disability Centre
- Health for All (South Leeds)
- Talks at a couple of sheltered housing
- User Carer Forum at St Mary's Hospital
- Health Improvement Manager, Public Health Resource Centre
- Citizens Advice Bureau
- Ageing Well Board, LCC
- Service Delivery team, East North East Area Social Work
- Health & Wellbeing Improvement Manager
- Assessment & Care Manager – Older People & Physical Disability team

Appendix 4b. List of publications and newsletters

- Local Care & Repair newsletters
- Local NHS newsletters, clinical commissioning newsletters
- Local Care & Repair agency websites
- Older People's Forum newsletters
- Adult Social care newsletters/bulletin
- Memory Cafe newsletter
- Websites and newsletters of various organisations and groups - health forums, older people's forums/networks; older people's groups, mental health organisations, community groups, websites for local areas or villages; etc.
- Local newspapers
- Voluntary bureaux websites
- Church websites and newsletters

Appendix 5a. Volunteers details form



VOLUNTEERS DETAILS FORM To be completed for all volunteers by agency

Initials _____

Unique Beneficiary Number _____

Age Range: 50 – 64

65 – 74

75 – 84

85+

Gender

Male

Female

Disability or long-term health condition?

Yes

No

Household Single

Couple

Other

Tenure

Owner

Social Rented

Private Rented

Other

Ethnic background (categories as used by Big Lottery)

White	English/Scottish/Welsh/Northern Irish/UK	
	Irish	
	Gypsy or Irish Traveller	
	Any other White background	
Mixed ethnic background	Mixed ethnic background	
Asian/Asian UK	Indian	
	Pakistani	
	Bangladeshi	
	Chinese	
	Any other Asian background	
Black/African/Caribbean/ Black UK	African	
	Caribbean	
	Any other Black/African/Caribbean background	
Other ethnic group	Arab	
	Any other ethnic group	



FEEDBACK QUESTIONNAIRE FOR VOLUNTEERS

**To be completed after 6 months of involvement in Silverlinks
Please return to your Silverlinks Project Officer**

Initials _____

Name of agency you volunteer for _____

Please tell us whether you **agree, neither or disagree** with these statements:

	Agree	Neither agree nor disagree	Disagree
Because of my involvement with Silverlinks.....			
"I now know more about housing & care possible options in later life"			
" I have a better idea of where to go for information and advice should I ever need it"			
"It has made me think about my own future housing and care"			
"I am in a better position to plan ahead for my own housing & care in the future"			
" I feel more confident about making decisions about my housing and care"			

As a result of volunteering for Silverlinks, would you say that your ability to plan for and/or manage changes to your housing and care situation has:

Increased significantly	
Increased	
Is about the same	
Decreased	



Unique Beneficiary Number (office use only) _____

Do you have any other comments about Silverlinks? Please write in below.

Thank you for completing this questionnaire.



MONITORING & FEEDBACK FORM FOR OLDER PEOPLE WHO HAVE BEEN SUPPORTED BY A SILVERLINKS VOLUNTEER

What are your initials? _ _

What is your age range? 50 – 64
 65 – 74
 75 – 84
 85+

Are you: Male Female

Do you have a disability or long-term health condition? Yes No

Household: Single Couple Other

Tenure of your home:

Owner Social Rented Private Rented Other

Ethnic background (categories used by Big Lottery)

White	English/Scottish/Welsh/Northern Irish/UK	<input type="radio"/>
	Irish	<input type="radio"/>
	Gypsy or Irish Traveller	<input type="radio"/>
	Any other White background	<input type="radio"/>
Mixed ethnic background	Mixed ethnic background	<input type="radio"/>
Asian/Asian UK	Indian	<input type="radio"/>
	Pakistani	<input type="radio"/>
	Bangladeshi	<input type="radio"/>
	Chinese	<input type="radio"/>
	Any other Asian background	<input type="radio"/>
Black/African/Caribbean/ Black UK	African	<input type="radio"/>
	Caribbean	<input type="radio"/>
	Any other Black/African/Caribbean background	<input type="radio"/>
Other ethnic group	Arab	<input type="radio"/>
	Any other ethnic group	<input type="radio"/>

We would like to know if what we are doing is useful and how we might improve.

We would be very grateful if you would answer three questions to give us important feedback.

1. When you first spoke to a Silverlinks volunteer, which of these describes your situation? (you can tick as many as apply)

Increasing (or start of) disability or ill health was making living at home more difficult	
I was feeling isolated	
I was wondering whether I should move home	
I was worried about keeping on top of home repairs & maintenance	
I was feeling pressured to move home	
I didn't know who to turn to for advice and information	
Other (please describe)	

2. As a result of talking to the Silverlinks volunteer which of the following would you say apply to you now? (you can tick as many as apply)

I now feel better able to make a decision about my living situation	
I now have a better idea of what my options are	
I know who to contact if I need any more help, advice or information	
It made no difference & didn't really help	
Other (please describe)	

Continues on next page

3. If you have made a decision or changed something about your living situation since talking to the Silverlinks volunteer please indicate which below.

I have decided to move, but I haven't moved yet, or am still looking	
I have moved: <ul style="list-style-type: none"> • to another flat/house (not specifically for older people) • to retirement/sheltered housing • other 	
I have decided to stay where I am	
I have decided to have repairs/improvements done to my current home	
I have decided to have adaptations done to my home	
Other (please describe)	

4. We would welcome any comments you have about the Silverlinks scheme. Please write in below.

Appendix 5d. Workshop feedback



Office Use Only
Unique Beneficiary Number:
Training title: planning ahead/pass it on/other
Location:

Silverlinks Workshop Feedback Form

We would like to know if what we are doing is useful and how we might improve. We also have to tell our funders about the results of our work.

We would be very grateful if you would answer a few questions to give us important feedback. All responses are anonymous.

About you

What are your initials? _ _

Are you: Male Female

What is your age range? 50 – 64
65 – 74
75 – 84
85+

Do you have a disability or long-term health condition? Yes No

Household: Single Couple Other

Tenure of your home:

Owner Social Rented Private Rented Other

Ethnic background

White	English/Scottish/Welsh/Northern Irish/UK	<input type="radio"/>
	Irish	<input type="radio"/>
	Gypsy or Irish Traveller	<input type="radio"/>
	Any other White background	<input type="radio"/>
Mixed ethnic background	Mixed ethnic background	<input type="radio"/>
Asian/Asian UK	Indian	<input type="radio"/>
	Pakistani	<input type="radio"/>
	Bangladeshi	<input type="radio"/>

CONTINUES ON NEXT PAGE

	Chinese	<input type="radio"/>
	Any other Asian background	<input type="radio"/>
Black/African/Caribbean/ Black UK	African	<input type="radio"/>
	Caribbean	<input type="radio"/>
	Any other Black/African/Caribbean background	<input type="radio"/>
Other ethnic group	Arab	<input type="radio"/>
	Any other ethnic group	<input type="radio"/>

Your opinions

Please tell us how far you agree with these statements:

Because of today's workshop.....	Agree	Neither agree nor disagree	Disagree
"I now know more about housing & care possible options in later life"			
" I have a better idea of where to go for information and advice should I ever need it"			
"It has made me think about my own future housing and care"			
"I am in a better position to plan ahead for my own housing & care in the future"			
" I feel more confident about making decisions about my housing and care"			

CONTINUES ON NEXT PAGE

After today’s workshop, do you feel you have better knowledge about the housing & care options available to you? (tick whichever statement applied)

	My housing	My care
Yes, much better knowledge		
Yes, a little more knowledge		
No, I don’t feel I have gained any knowledge		
Any comments?		

Would you recommend this workshop to other people?

Yes

No

We have a number of volunteers with experience of moving home or having adaptations. If you are thinking about having adaptations or considering moving home, our volunteers are available to talk to and share their own experiences and will help you talk through your situation so you can reach your own decision about your housing.

If you would like one of our volunteers to contact you to arrange a chat, please write your name and phone number below. We will not use your details for any other purpose.

Name:

Telephone number:

Appendix 5e. postcard for events/talks monitoring



How did we do?

We would be very grateful if you would answer a couple of questions to tell us whether what we are doing is useful and how we might improve.

Please tell us whether you agree, neither or disagree with these statements

Because of today's talk/ workshop/ conversation.....	Agree	Neither agree nor disagree	Disagree
<i>"I know more about possible housing & care options in later life"</i>			
<i>" I have a better idea of where to go for information should I ever need it"</i>			
<i>"It has made me think about my future housing and care"</i>			
Any comments?			

Please turn over

What is your age range? 50 – 64 **Are you:** Male Female
 65 – 74
 75 – 84
 85+

Do you have a disability or long-term health condition? Yes No

Your household: Single Couple Other

Tenure of your home:
 Owner Social Rented Private Rented Other

Your ethnic background:

White	English/Scottish/Welsh/Northern Irish/UK	<input type="radio"/>	Irish	<input type="radio"/>
	Gypsy or Irish Traveller	<input type="radio"/>	Any other White background	<input type="radio"/>
Mixed ethnic background	Mixed ethnic background	<input type="radio"/>		
Asian/Asian UK	Indian	<input type="radio"/>	Pakistani	<input type="radio"/>
	Bangladeshi	<input type="radio"/>	Chinese	<input type="radio"/>
	Any other Asian background	<input type="radio"/>		
Black/African/Caribbean/ Black UK	African	<input type="radio"/>	Caribbean	<input type="radio"/>
	Any other Black/African/Caribbean background	<input type="radio"/>		
Other ethnic group	Arab	<input type="radio"/>	Any other ethnic group	<input type="radio"/>

OPTIONAL Please use this space to tell us about any other activity you've carried out, or any stories about activities you've done and the impact on people you have supported. Thank you!

Appendix 5g. Evaluation terminology

Evaluation Terminology

Evaluation

Making judgements about your project's or service's performance

Monitoring

Collecting the information that will help you answer questions about the performance of your project or service, including its evaluation

Aims

The *changes* you are trying to achieve by undertaking a project/ delivering services

Objectives

The methods by which you achieve your aims ie the means to an end

Outputs

The activities, services and products your organisation undertakes/ provides

Outcomes

Outcomes are the changes, benefits or other effects that happen as a result of your project or service

Qualitative information

Descriptive information presented in words eg. case examples which illustrate an aspect of a service

Quantitative information

Information given as numbers eg. number of client visits, number whom moved

Targets

A defined level of achievement (often quantitative and output focussed) that an organisation or project sets itself to achieve in a specified period of time

Impact

Broader or longer-term effects of a project's activities, outputs and outcomes.

Appendix 5h. Model evaluation framework

Sample Evaluation Framework - Outcomes, Indicators and Methods of Measurement

Outcome 1. Older people involved with the project feel better able and prepared to manage life changing transitions, particularly with regard to their housing and living situations			
Indicator	Indicator Level	Timescale	Method of measurement
Number of older people taking part in project activities who report improved ability to plan for and manage changes to their housing and care situations	xx older people take part in project activities. 75% report improved ability after contact with project/ activity	<i>(add in target numbers for year/ quarters)</i>	<ul style="list-style-type: none"> - QUANTITATIVE - MEASURE IMPACT ON VOLUNTEERS: Record basic characteristics of all recruited volunteers then ask them all to completed follow up Questionnaire - MEASURE IMPACT ON ALL WORKSHOP PARTICIPANTS using standard questionnaire at end of training/ workshop - QUALITATIVE - sample survey 6 months/ 1yr after workshop/ training - QUALITATIVE - blog, story, interview, case studies etc. exploring individuals experience of being a volunteer / trainee and thoughts about their ability to prepare for future as a result of involvement - QUALITATIVE - (quarterly or annual?) focus group (s) with volunteers/ stakeholders
Number of vulnerable older people linked to older volunteers who feel more in control and better able to manage their housing and living situations	xxx older people will have talked to and been supported by another older person with related personal experience	<i>(add in target numbers for year/ quarters)</i>	<ul style="list-style-type: none"> - FOR ALL ONE2ONE BENEFICIARIES: Record details of older people spoken to and supported/ advised on one-to-one basis by a Silverlinks volunteer, noting the characteristics of the older person who is advised, reason(s) for facing dilemma/issue, and then follow up with a simple “after” questionnaire at end of intervention to identify outcomes, including impact on knowledge & capability to manage housing situation/ any resulting changes to living arrangement - Sample of case studies/stories and/ or blog

<p>Number of older people with increased knowledge and awareness of later life housing and care issues and options</p>	<p>xx older people will have received information from a 'pass it on' trainee</p>	<p><i>(add in target numbers for year/ quarters)</i></p>	<ul style="list-style-type: none"> - QUANTITATIVE OUTPUT: Record numbers of older people at pass-it-on training sessions, which will form basis for estimate the number of people subsequently receiving information from a “pass it on” trainee (ie each person will pass on information to another 10 people) - QUANTITATIVE OUTPUT Record number of older people attending talks/ workshops/ events where info is provided - QUALITATIVE Use standard short feedback card/ form at all talks/ events to monitor usefulness of info provided
--	---	--	---