



Safeguarding Policy

Duty of care

Trustees' view is that their duty of care extends to all those individuals that interact with the objects and activities of the Trust. These include trustees, committee members, beneficiaries, volunteer visitors and donors. Procedures are in place to safeguard protection and are as follows:

Checks on individuals

While the Trust does not provide a regulated ongoing activity to its beneficiaries, all trustees, committee members and volunteer visitors are required to undertake a basic Disclosure and Barring Service check, regardless of whether they have any direct contact with beneficiaries. Until the Trust is satisfied of the outcome of the disclosure, the volunteer makes no visits and the potential trustee or committee member is not formally appointed. Additional checks are also made on potential trustees with the Charity Commission, Companies House and the Individual Insolvency Register.

Visits are made to beneficiaries and circumstances verified to ensure that their needs could be appropriately expressed to the Trust. Trustees also recognise that needs cannot always be adequately expressed in an application form, letter or telephone conversation. In regard to our duty of care, face to face contact with the beneficiary can result in a specific need being identified, for example decorating or help with clothing, which the beneficiary had not thought to mention and ask for assistance.

Protection of sensitive information

The Trust holds sensitive information on beneficiaries, including health and financial details. The protection of this sensitive information is contained in the Trust's data protection and privacy policies.

Training

Training is provided to volunteers at least biannually. This includes both knowledge based and soft skills training to assist with visits. For example, in order to increase sensitivity and an understanding of beneficiaries' individual circumstances, this has included training in respect of bereavement and mental health awareness. Visitors will also be requested to undertake data protection training.

Safety of individuals

When a visitor calls on a beneficiary for the first time, the beneficiary is advised by telephone and by letter how the visitor will arrange the meeting and how they will verify their identity. Beneficiaries are also advised that a family member or close friend can join them. Should the Trust or the visitor consider an element of risk in visiting the beneficiary in his or her own home, the visitor is advised to arrange the meeting in a public place, or to be accompanied when they visit. Visitors can also refuse to make a visit. The Trust also holds age related insurance in respect of potential accidents to visitors during the course of a visit.

Visitors are requested to alert the Trust administration of any issues or difficulties they encounter as part of a visit along with any concerns about the beneficiaries they are visiting. For example, visitors have reported broken essential white goods, which were then replaced or, have suggested the provision of an emergency alarm for an older or less agile beneficiary, which was then provided.

Should the visit cause any distress to the beneficiary or to the visitor, they would be encouraged to contact the Trust.

Donors

The Chartered Secretaries' Charitable Trust is a member of the Institute of Fundraising and complies with Code number 1.2 (e) of the Code of Fundraising Practice. This states that 'If a fundraiser knows or has reasonable ground for believing that an individual lacks capacity to make a decision to donate, a donation must not be taken'. It continues 'A donation given by someone who lacked capacity at the time of donating must be returned'. The Trust has needed to refuse and return such a donation.

The Trust will take all reasonable steps to treat a donor fairly and enable them to make an informed decision about any donation.

Registration with the Fundraising Regulator is also under consideration and compliance with the Fundraising Code is acknowledged.

Raising and reporting any safeguarding concerns

Trustees have considered how to respond to appeals, complaints and serious incidents. All appeals and complaints received would be resolved in line with the appeals, complaints and comments policies and procedures. Any serious incidents would be dealt with in line with our serious incidents procedure.

Trustees will continue to monitor this policy and ensure that risks are identified in our risk register with appropriate controls in place to safeguard individuals who interact with the objects and activities of the Trust.