The Chartered Secretaries' Charitable Trust

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 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. For Trustee appointments, individuals are subject to additional checks with the Charity Commission, Companies House and the Individual Insolvency Register to ensure they are willing and eligible to take up the role.

Volunteers visit beneficiaries to verify their circumstances and 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 detailed in the Trust's data protection and privacy policies.

Training

Safeguarding training is provided to volunteers on appointment and refreshed at least biennially or more frequently if there are significant changes in legislation, policy or process which warrant bringing this forward. The training 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 includes training in respect of bereavement and mental health awareness. Visitors are also required 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 if they feel it is unsafe to do so. The Trust holds insurance in respect of potential accidents to visitors during the course of a visit.

Visitors are required 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, in the past, 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. In the event the visitor is concerned for the beneficiary's wellbeing or safety, the visitor should contact Trust administration as soon as possible after the visit and follow the guidance laid out in the section below entitled "Raising and Reporting any Safeguarding Concerns".

Should the visit cause any apparent distress to the beneficiary or to the visitor, the visitor is encouraged to politely remove themselves from the situation and contact the Trust administration immediately.

Donors

The Chartered Secretaries' Charitable Trust is registered with the Fundraising Regulator and compliance with the Fundraising Code is acknowledged.

In particular, the Trust complies with Section 1.3 of the Code of Fundraising Practice ensuring all reasonable steps are taken to treat a donor fairly so they can make an informed decision about any donation. The Trust does not take donations from individuals if they know, or have good reason to believe, that a person lacks capacity to make a decision to donate, or is in vulnerable circumstances which mean they may not be able to make an informed decision. If a donor makes a donation while they do not have the capacity to make an informed decision, the Trust will return the money to them.

Raising and reporting any safeguarding concerns

Where there are concerns for the safety and/or wellbeing of beneficiaries following a visit, the visitor should make notes at the time, recording the date, time, raise the concern with the Trust administration as soon as possible after the event. The Trust administration will consider whether there is any immediate risk of harm and take appropriate action, referring to other agencies as appropriate.

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.