

# Join our team: Volunteer application form

## 1. Your details

Surname  First name  Title

Address

Postcode

Telephone  Mobile

Email address (if you have one)

Date of birth   /   /

## 2. Business details

Name

Address

Postcode  Telephone

Email

## 3. About you

Are you still a practising pensions professional?  Yes  No

If no, what date did you stop practising?

Do you have any disability requirements?  Yes  No

For example, communication needs such as large print or accessibility for events?

If yes, please state:

**4. What areas are you interested in volunteering?**

Resolving pension disputes

Yes  No

Other, for example, TPO ambassador, training, admin

Yes  No

Roughly how much time do you think you would like to volunteer each week/month

**5. Please summarise your formal qualifications, both academic and professional**

Awarding body/qualification level:	Title of qualification/subject area:	Date completed:

**6. Current/most recent employer**

Name

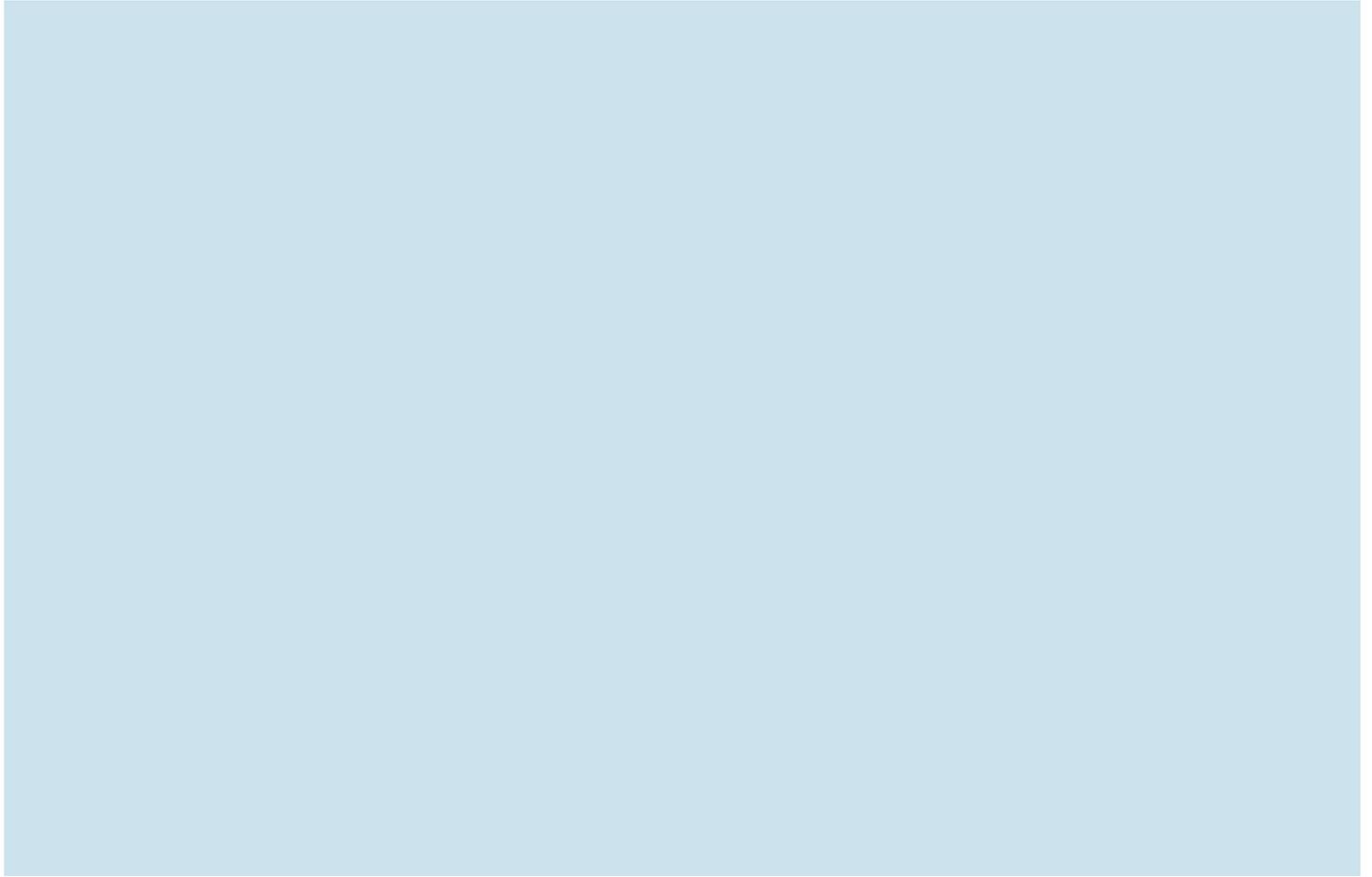
Address

Postcode

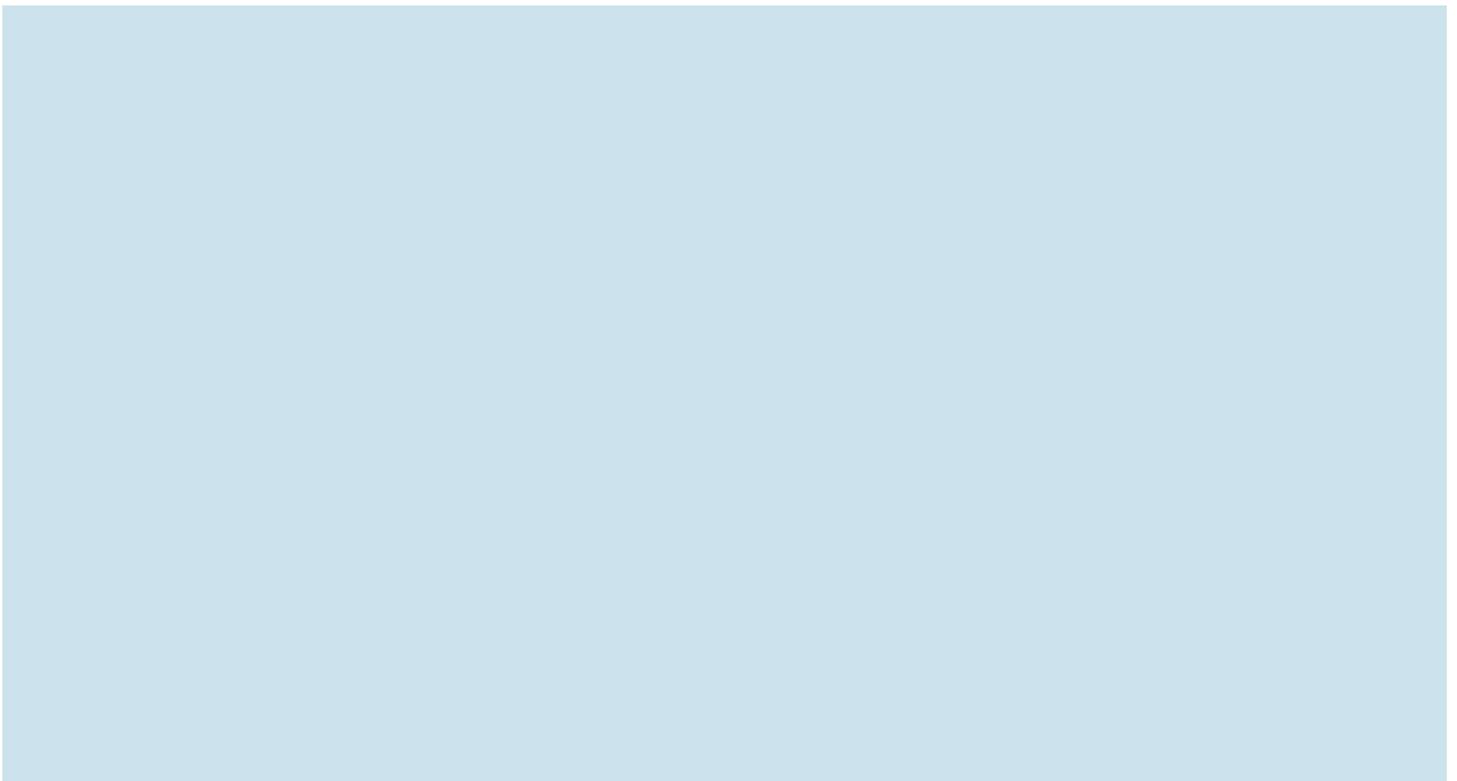
Job title

Period of employment

**7. Employment duties** (please give full details – continue on a separate sheet if required)



**8. Previous pensions employment** (please give full details – continue on a separate sheet if required)



**9. Number of years' pension experience**

**10. Keeping up to date**

Do you have regular access to information about current legislation and practice?

Yes

No

If you're not currently practising professionally, please outline below how you intend to keep up to date with current pensions information and standards

**11. How did you find out about us? (please select one)**

Recommendation from a friend or colleague

Employer

Pension scheme administrator, manager or trustee

Internet search

Other (please specify)

## 12. Security vetting and criminal record checks

### HMG Baseline Personnel Security Standard (BPSS)

Everyone undertakes work for The Pensions Ombudsman (TPO) is expected to successfully complete the BPSS check.

There are four elements of verification and we must be satisfied that evidence has been made available to enable verification of each element. These are:

- confirmation of nationality and immigration status;
- confirmation of identity;
- verification of previous three-year employment history;
- disclosure of unspent criminal convictions by way of a Basic Check with the Disclosure and Barring Service.

The check will be carried out when you have been accepted by TPO as a volunteer.

Applicants should be aware that supplying false information or failing to disclose relevant information either on this application form or as part of the security vetting process could amount to a criminal offence.

## 13. Declaration

I confirm that I have read and understood the attached volunteer code of practice and agree to abide by the code at all times.

Signed

Date

**Please send the completed form to:** Paul Day, The Pensions Ombudsman, 10 South Colonnade, Canary Wharf, London E14 4PU or email: [paul.day@pensions-ombudsman.org.uk](mailto:paul.day@pensions-ombudsman.org.uk)

## Volunteer Code of Practice

This Code of Practice sets out the expectations The Pensions Ombudsman (TPO) has of its volunteer advisers. It does not set out to cover every circumstance. It has been kept as brief as possible, so it does not follow that unless a specific action is prohibited under the Code of Practice, it is permissible.

Volunteer advisers need to observe the same disciplines and standards that apply in their other business affairs, in order to maintain and enhance the reputation of the pensions profession and TPO.

We expect volunteer advisers to:

- share our aims and values: to be fair, collaborative, open, show respect and build trust
- conduct themselves in a manner which protects the good name of TPO.

**TPO volunteer advisers agree to:**

### Casework

- use their skills and expertise to identify resolutions to issues that respond to the needs of the parties concerned
- engage openly and promptly with the TPO office on case administration such as allocation, progress, closure and ad-hoc requests
- handle cases promptly in accordance with the highest professional standards, calling on the help of TPO staff when necessary
- arrange to immediately return work to the TPO office for reallocation if unable to handle it promptly
- ensure all reasonable steps have been taken to obtain the information necessary to satisfy the complainant and facilitate the best possible outcomes
- return all case papers immediately to the person reviewing the case or to TPO when the case is complete or when otherwise requested to do so
- ensure written information is always given on TPO headed paper or with the agreed email footer containing the disclaimer wording, identifying the volunteer as an adviser and not by any other title.

### Handling customer information and Information security

- ensure the security of our information at all times, by observing TPO's information security policy and taking appropriate measures whenever handling customers' data
- maintain the confidentiality of customers, ensuring they always have their written authority to approach any third party before doing so
- declare any conflict of interest or personal connection to respondents, individually or through their employer, and return related case papers to TPO
- delete computer records within six months of acknowledgement that the case has been safely received by the person reviewing the case or TPO office.

### TPO policies, procedures and requirements

- undertake compulsory training such as induction sessions and new volunteer adviser training days
- attend workshops, training events and meetings, with frequency agreed upon with TPO
- maintain a comprehensive knowledge of pensions law and practice
- inform TPO of any change in personal data provided on becoming a volunteer adviser or subsequently (for example, change of employment or contact details)
- keep TPO informed of availability and issues that may affect their ability to fulfil advisory duties
- follow TPO policies and procedures including with regard to professional behaviour
- observe guidance notes (and other relevant documents regarding volunteer advisory work) as issued from time to time, clearing any matters of doubt with the TPO office

- learn how to raise concerns or use the 'whistleblowing' policy if appropriate
- return any TPO property on ceasing to be a TPO volunteer adviser.

## **Conduct and standards**

- act objectively in all work
- never give financial advice
- not meet customers face to face
- conduct themselves with courtesy and consideration towards everyone with whom they come into contact
- remain impartial, not automatically taking the side of the complainant
- not use their status as a TPO volunteer adviser to gain extra credence in the conduct of business affairs, although it can be used for CVs or biographies in a personal context
- not use their status as a TPO volunteer adviser for any financial gain
- ensure that any advertisement or other public announcements with which their name or status as a TPO volunteer is associated will not bring TPO into disrepute
- not make any public comment about TPO, its service or its complainants, without express consent of The Pensions Ombudsman.

## **Insurance**

Adherence to this Code of Practice is a condition of any Professional Indemnity (PI) insurance offered by TPO. Failure to follow the Code of Practice may result in a loss of PI cover. TPO does not provide any alternatives to this cover.

## **Discipline**

If TPO receives a complaint of unprofessional conduct, we will make appropriate investigations. If disciplinary action is considered necessary, we will decide on the nature of any action to be taken which may include removal as a TPO volunteer adviser.