

Join our team: Volunteer application form

1. Your details

Surname	<input type="text"/>	First name	<input type="text"/>	Title	<input type="text"/>
Address	<input type="text"/>				
	<input type="text"/>	Postcode	<input type="text"/>		
Telephone	<input type="text"/>	Mobile	<input type="text"/>		
Email address (if you have one)	<input type="text"/>				
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

2. Business details

Name	<input type="text"/>				
Address	<input type="text"/>				
Postcode	<input type="text"/>	Telephone	<input type="text"/>		
Email	<input type="text"/>				

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

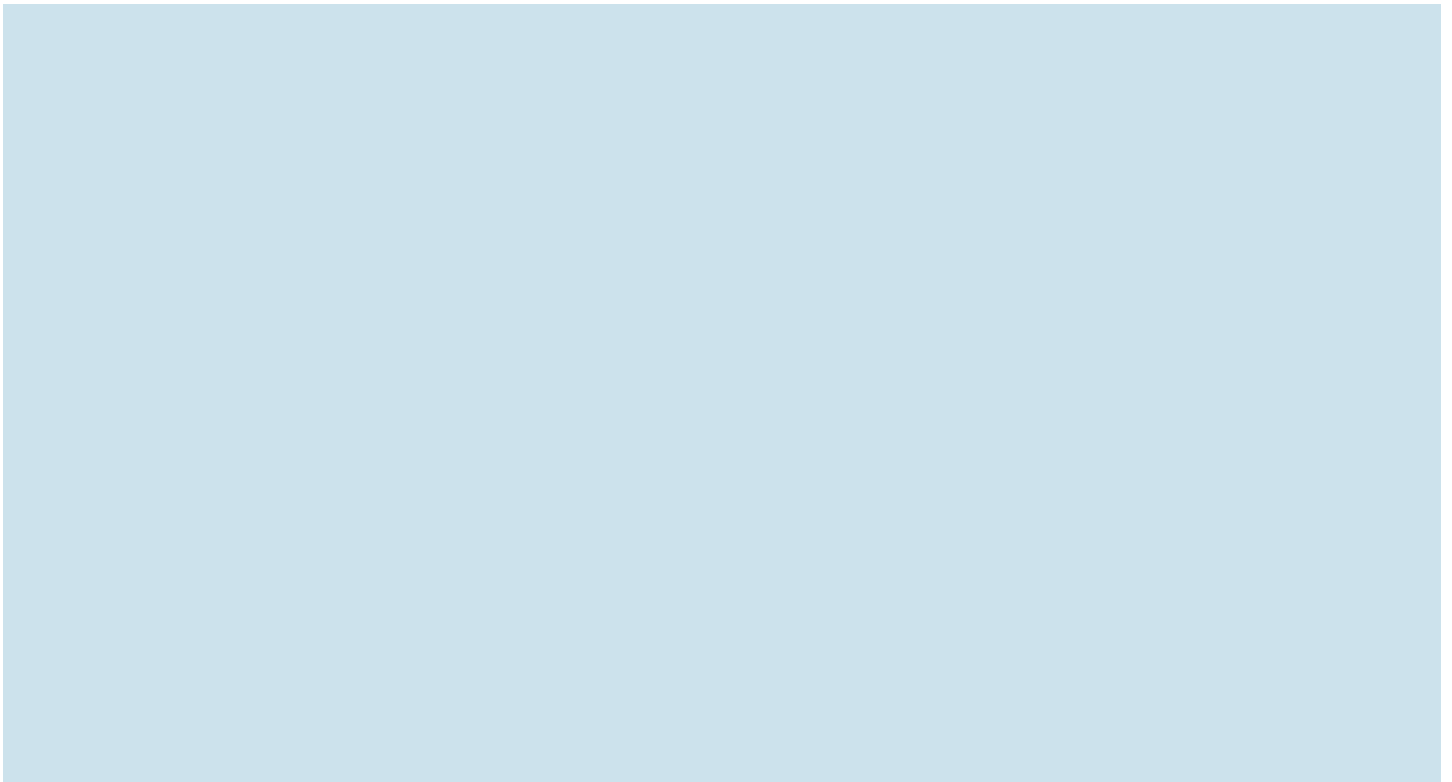
Job title

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 who 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

By signing I confirm I have read the Volunteer Privacy Policy (below) and agree to my personal data being used in order to process my application form and to manage my work as a TPO volunteer.

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

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 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.

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.

Privacy notice (volunteers)

Our processing of your personal data for volunteering purposes

Why we process information about you

The Pensions Ombudsman (TPO) is committed to respecting and protecting your privacy. This notice explains how and for what purposes TPO will collect and process any personal information about you to administer your volunteer function with TPO.

As TPO processes personal information about you, you are a “data subject.”

TPO collects and retains personal data that is relevant to your volunteer function. We use your personal data where necessary in order to fulfil our obligations to you as our volunteer and any legal obligations we may have under your volunteering arrangement. We will also share this data with third parties where necessary (please see the section “Who we share your data with” below).

We will also use personal data to compile statistics and conduct analysis in accordance with our duties under the Equality Act 2010 and to comply with other legal requirements such as responding to requests made under the Freedom of Information Act 2000. Where possible we will anonymise your data.

We will collect your personal data from different sources including:

- you
- your referees
- educational establishments you have attended or are attending
- your current employer and / or any previous employer
- Ucheck, Secure Screening Services and The Disclosure and Barring Service (for the purposes of security and other vetting procedures)
- third party service providers
- providers of learning management systems or training.

The purposes for which we will process your personal data include:

- to maintain accurate records
- to provide references
- to keep a record of your contact details (including emergency contact details)
- to carry out vetting procedures including a DBS check and other security clearance procedures

- for monitoring use of TPO systems in accordance with our security policies, including access to premises, computer and telephone use and reporting data breaches or suspicious activities where appropriate
- for monitoring TPO premises (including by CCTV) for the purposes of protecting TPO and its workforce against injury, theft, legal liability, fraud or abuse
- to facilitate and maintain accurate records of and ensure compliance with TPO workplace management policies
- for investigating complaints made against TPO
- to monitor compliance with TPO Code of Practice and recording of conflicts of interest, hospitality and gifts
- to monitor attendance at, and participation in, work-related training events in-house, externally and online
- to monitor recruitment and performance-related data such as objectives, comments, feedback, skills and competencies, work related qualifications and other information relevant to the records of volunteers to produce relevant statistics.
- to make appropriate disclosure for the purposes of legal proceedings
- to promote TPO through promotional videos and literature
- to perform our contractual obligations with third party suppliers and service providers
- to facilitate and process a complaint you may make or feedback you may give about the contact you have had with us.

The kind of personal information we collect and process

Personal data

Personal data refers to any information by which a living individual can be identified. Individual identification can be by one piece of information alone or in conjunction with other information.

The personal data we collect and process about you may include, but is not limited to: name, address, other contact details (e.g. email and telephone numbers), sex, marital status, date and place of birth, nationality, passport details, driving licence, employer, educational qualifications and history, job title and employment history, pension history, family details including their relationship to you, your relationship with others, images of you including photographs and CCTV footage, location data or online identifier, financial details, national insurance number, recruitment and performance related information.

Special category data

Certain categories of personal data have additional legal protections when being processed. These categories are data about your health, racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data or data concerning your sex life or sexual orientation.

The special category data we collect and process about you may include your race or ethnic origin and/or your religious beliefs and sexual orientation (e.g. for equal opportunity monitoring, when compiling statistics and conducting analysis for the purposes of the

Equality Act 2010 or responding to a request under the Freedom of Information Act 2000). Where possible we will anonymise your data.

Criminal offence data

The processing of criminal offence data also has additional legal safeguards. Criminal offence data includes information about criminal allegations, criminal offences, criminal proceedings and criminal convictions. TPO does not keep a comprehensive register of the criminal convictions or cautions of prospective or current volunteers. However, as part of our vetting processes each person will be subject to security clearance that will include obtaining information about any criminal convictions or cautions both from you and from third-parties. TPO will retain this information during the period of your volunteering and afterwards in certain circumstances.

Our legal basis for processing your data

Consent

As a volunteer or prospective volunteer (prior to you entering into a volunteering arrangement with us) we will collect and process your personal, special category or criminal offence data on the basis of your explicit consent to do so. You can withdraw your consent at any time. However, if you do withdraw your consent or refuse to provide the data required for the recruitment process we may not be able to progress your application properly or at all. If you withdraw your consent as a volunteer, the volunteering arrangement will cease.

There may be occasions where it is necessary to seek your further consent to process your personal data, including special category data. For example, if a reference is received regarding your volunteering arrangement with us, further consent will be required.

Whenever further consent is required, you will be provided with a consent form to complete. This will explain:

- what you are being asked to agree to and why
- how your data will be used
- who we will share your data with
- your right to withdraw your consent at any time
- the process through which you can withdraw your consent
- who to contact if you have any concerns about the use of your data.

Legitimate Interests

There are some circumstances where we will process your personal data on the basis that TPO has a legitimate interest in doing so. For example, when we collect information about who to contact in an emergency and when CCTV monitoring is used in workplace premises. We consider that having contact details in the event of an emergency involving our staff and safeguarding the security of our premises and the information held in them are legitimate interests.

We will always seek to balance our legitimate interests with the fundamental rights and freedoms of data subjects.

Legal obligation

There are some circumstances when we may need to process your data where there is a legal obligation to do so. See 'Who we share your data with' for examples of this.

Who we share your data with

For the volunteering related purposes set out above we may need to share your personal data with third parties. The categories of persons we may share your personal data include:

- Ucheck, Secure Screening Services and The Disclosure and Barring Service (for the purposes of security and other vetting procedures)
- third-party suppliers and service providers
- TPO service users
- Persons or organisations requesting a reference in relation to your activity with us.

We are also required to share your data with third parties where there is a legal obligation to do so. We share information with other public bodies and government departments in order to facilitate the exercise of their statutory or other public functions. For example, to assist with the issue of a witness summons or where your name appears on material that we are legally bound to disclose for legal proceedings. The categories of persons we may share your data with include:

- courts and tribunals
- public bodies
- the Information Commissioners' Office
- police forces and other law enforcement agencies
- regulatory bodies or ombudsmen and the Health and Safety Executive
- professional advisers, experts and consultants.

How long we will keep your data

TPO will hold the data about you whilst you act as a volunteer and up to six years after you finish acting as a volunteer.

Your rights in relation to the data we hold

Data protection legislation provides you with a number of rights relating to your personal data. These rights are subject to some specific exemptions. Your rights may include:

- the right to access your data
- the right to have your data corrected if it is wrong or incomplete
- the right to request restrictions to the processing of your data
- the right to object to your data being processed
- the right to have your data erased

- the right to be informed about how your data is processed
- rights relating to automated decision making and data portability

You should keep us informed of any changes to your information so that we can be confident that the data we hold about you is accurate. You should also ensure that you keep us updated promptly about any changes to personal data which relates to your obligations under the volunteer Code of Practice.

Our Data Controller and Data Protection Officer

Our data controller is the Ombudsman. The data controller has overall control over the purpose for which and the way we obtain and process personal data.

TPO has a designated Data Protection Officer. If you have any queries or concerns about exercising your data rights or the way in which we collect, handle or process your data, please contact the Data Protection Officer either via the 'contact us' page of our website or by emailing

Alternatively you can contact our switchboard on 0800 917 4487 between 10.00 am and 2.00 pm, Monday to Friday.

Your right to complain to the Information Commissioner

If you are unhappy with any aspect of the way in which we have processed your personal data, you have the right to make a complaint to the Information Commissioner's Office: Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF www.ico.org.uk Tel: 0303 123 1113

Feedback or complaints about our service or staff

If you want to give us feedback or make a complaint about our service or staff please contact us through the 'contact us' page of our website or by emailing

Alternatively you can contact our switchboard on 0800 917 4487 between 10.00 am and 2.00 pm, Monday to Friday.

Review of this notice

This privacy notice will be regularly reviewed and may be revised. Please visit our to check for any updates.