



Travelling Companionship Manual January 2025

For staff and volunteers

Making Norfolk a great place to grow older

Registered Charity No. 1077097

Contents

| | |
|---|----|
| Introduction | 3 |
| Our Vision, Mission, Objectives and Strategic Priorities..... | 3 |
| Principles and Objectives of our Travelling Companionship service | 3 |
| Expectations and limitations of the service | 4 |
| Staff Role | 5 |
| Volunteer Role | 6 |
| Service Users/Client | 7 |
| Keeping Safe..... | 8 |
| Information, Advice, Signposting and Referring..... | 9 |
| Referrals and active cases..... | 10 |
| Frequently Asked Questions | 15 |
| What to do if things go wrong..... | 15 |
| Useful Information | 16 |
| Appendix..... | 16 |
| Document Control | 16 |

Introduction

Age UK Norfolk was established in 1947. Today our mission is to make Norfolk a great place to grow older. We recognise that service standards are necessary to ensure consistent and quality services to the people to whom we provide help and support. This Manual lays out the standards and processes that staff and volunteers within the Travelling Companionship service should follow in their everyday practice. It provides a comprehensive set of guidelines and procedures and is to be used as a tool for induction, training and as a reference document. This manual is an extension of organisational procedures and policies.

Staff and Volunteers are required to adhere to this manual; however, they are also encouraged to commit to continuous quality improvement and therefore questions, comments and suggestions are welcomed at any time. The service needs to remain responsive to changing demands and the manual is therefore subject to revision.

Our Vision, Mission, Objectives and Strategic Priorities

Travelling Companionship forms part of the Supporting and Enabling Strategic Priority. A copy of the organisational strategic priorities, along with our vision, mission and objectives can be found on our website [Vision, mission and objectives | Age UK Norfolk](#)

Principles and Objectives of our Travelling Companionship service

Our service matches lonely and isolated older people, who live in Norfolk, with a trained travelling companion. We aim to reduce loneliness amongst lonely and socially isolated older people by helping them to reconnect with their local communities, friends, and family, and to help them to take steps in leaving their homes to use public transport, community transport, and taxis. It will also support them in walking and cycling, and help them to address the barriers they face in going out, such as anxiety and a lack of confidence. Their companion will accompany them on journeys and provide empowering support to enable them to be able to take the journey alone eventually. This Support is expected to last for 6-8 weeks as our aim is to increase confidence levels and to reduce the anxiety that many older people now experience after such a prolonged period of isolation during the Covid pandemic.

Later life should be a fulfilling and enjoyable experience and older people should be enabled to play a full part in community life.

The service is committed to equality, fairness and justice whilst valuing the diversity of the individual. The service will ensure that everyone will be treated equally, in line with Age UK Norfolk's Policies and procedures.

Our objectives are:

- To reduce loneliness amongst lonely and socially isolated older people by helping them to reconnect with their local communities, friends, and family, by helping them to take steps in leaving their homes to use public transport, community transport, taxis or by walking or cycling.
- To help address the barriers faced by going out, such as anxiety and a lack of confidence.
- To increase confidence levels and to reduce the anxiety that many older people now experience after such a prolonged period of isolation during the Covid pandemic.

Expectations and limitations of the service

Mental Capacity

We can only support people who are believed to have mental capacity. We must presume mental capacity so if you suspect that the service user may not have capacity to understand then we can ask NCC/GP to complete a capacity assessment.

The MCA says:

- assume a person has the capacity to make a decision themselves unless it is proved otherwise.

The MCA says a person is unable to make a decision if they cannot:

- understand the information relevant to the decision.
- retain that information.
- use or weigh up that information as part of the process of making the decision.

Also remember that some people can have fluctuating capacity or seem not to have capacity due to an UTI.

Responsibilities of a Travelling Companion (Staff and volunteers)

- To accompany a client on journeys and to provide empowering support to enable them to be able to take the journey alone eventually. This Support is expected to last for 6-8 weeks
- Undertaking person centred conversations, understanding that each person is different and has different views, goals, and desired outcomes.
- Working to the agreed guidelines and policies of the service.
- Only carrying out support within the remit of the service.
- Ensuring that Age UK Norfolk have up to date personal information and emergency contact details.
- Recognising the importance of the service they offer and committing themselves to initial induction, training, and periodic updates.
- Informing the service user and coordinator in advance if they are unable to make a visit.
- Taking care to notice any changes in the service user and to inform the coordinator.
- Not taking any other person to the service user's home or on to a journey unless authorised by the service user and the coordinator.
- Adhere to the recording and monitoring procedures.

What makes a good Travelling Companion?

- Utilising the support network within the organisation
- Having an understanding positive nature
- Having excellent communication skills

What a Travelling Companion should NOT do

- Provide information to other organisations or individuals that are confidential unless it is a safeguarding issue and has been approved by Age UK Norfolk staff
- Act in a befriending capacity
- Take a service user out in their own car or go in any private vehicle with the client.
- Disclose personal information to a service user e.g., address, phone number.
- Accept or provide gifts (Review gift policy)
- Continue contact with the service user after the case has been closed.
- Be negative about any services the service user is receiving or being provided.
- Attempt to lift or physically support a service user instead call for assistance.

Staff Role

| | |
|--|--|
|  |  |
| Laura Hawkie-Chapman (Coordinator) | Lisa Hodges (Coordinator) |
| laura.hawkiechapman@ageuknorfolk.org.uk | Lisa.hodges@ageuknorfolk.org.uk |
| 01603 785210 | 01603 787111 ext 236 |

Coordinator Role

The Travelling Companionship Coordinators are responsible for all volunteers and service users.

Volunteer Role

Volunteer Role Description

Volunteer's role descriptions can be found on our website - [Volunteering roles | Age UK Norfolk](#)

Volunteer induction

Volunteer's induction will be booked as per the instructions in the volunteer handbook procedure. Once a volunteer has been fully vetted and inducted, they can start to support the service.

Note to staff

A volunteer cannot be made active on CLOG until they have completed all the sections in the recruitment procedure and returned all relevant documents.

When the staff member is making the volunteer active on CLOG you will need to ensure you are completing the following for volunteers:

- *Add the volunteer to the 'Groups and Skills' section.*
- *Ensure the 'Preferred method of contact' box on CLOG has been completed.*

While the volunteer is active it is the responsibility of the staff team to keep the volunteers record up to date.

- *Ensure at the Annual Review, details are checked and updated if necessary.*
- *Staff team to update CLOG.*
- *Update CLOG with training events attended in the clubs and Clinics section.*

If group emails are being sent, the volunteers email address will always be hidden by using the BCC function.

Volunteers - On Hold

Sometimes volunteers need to take some time out of volunteering but do not want to leave. If a volunteer is on hold for over 6 months, they must have a meeting with their coordinator upon return to ensure they have been given any relevant updated information.

Note to staff - *If a volunteer is on hold, this needs to be clearly marked on CLOG and the volunteer coordinator needs to be updated. If it is not suitable for the volunteer to be contacted while they are 'on hold' please remove their email address from the group list and make this clear on CLOG*

Volunteer Support and Supervision

Each volunteer will have a named coordinator as their main contact; however, volunteers can expect support from the whole of the Travelling Companionship Team.

Volunteers may request a face-to-face Supervision session with their coordinator at any time.

Group Supervision

Group Supervision will be provided via service volunteer meetings. We aim to hold these 3 times a year either in person or remotely via Teams. It is expected that active volunteers will attending at least 1 network meeting a year and engage in Age UK Norfolk volunteer community.

Volunteers - Leaver

If a volunteer wishes to end their volunteering with Age UK Norfolk It is important that all active cases must be handed over to a coordinator and their service users informed as soon as possible. The volunteer must remember that they are unable to continue to support any Age UK Norfolk service users once they have left and they must:

- Delete/destroy all contact information they hold for any service users.
- Return all AUKN property including the badge.

In all cases the companion needs to end all contact with the service user and both parties need to be advised that if they continue a relationship this is outside of AUKN and there will be no insurance cover in place.

Note to staff remember to update CLOG (including groups and skills)

Service Users/Client

Service users Rights

- To receive assistance from a trained companion, following the service principles, who will have knowledge and understanding of the needs and issues affecting older people.
- Be treated as an individual, according to the principles of the service.
- To have their case dealt with promptly and thoroughly.
- Receive a service which offers:
 - An introductory visit by the service coordinator.
 - Regular contact from Age UK Norfolk until a suitable companion is found.
 - Be advised of and have open access to Age UK Norfolk's Complaints Procedure.

Responsibilities of the organisation to volunteers and service users

- Develop and monitor the service ensuring that the service remains relevant and responsive to the needs of older people in Norfolk.
- Provide training and support to volunteers, recognising that the service requires specific and general skills and knowledge, which continually need updating.
- Address complaints from both service users and volunteers. To learn from complaints, and to carry out any changes of practice if necessary. To ensure compliments and complaints are given equal recognition.

Keeping Safe

Safeguarding

If you uncover or have any suspicions regarding any type of abuse, please contact a member of the Travelling Companionship team immediately. If necessary, the team will then file an internal safeguarding report and make a safeguarding report in line with our policy, which may include notifying Social Services or if known, the service users GP. The volunteer will be advised if they need to take any further action. We do not always get updates from Norfolk County Council/GP on safeguarding reports as it is not always in our interest to know. This does not mean relevant action is not being taken. [Updated: Raising a safeguarding adults concern checklist | Norfolk Safeguarding Adults Board](#) is a helpful checklist for safeguarding.

Sharing personal information

Never give service users your personal contact details. This is so that you will not be harassed by people calling you and asking you to do more than you have agreed to do. If a service user needs to contact, you they will call the office. **If you need to call the service user withhold your number by using 141.**

If you need to give a professional your contact information, please do so with caution and check with a member of staff.

Risk Assessment

To protect staff and volunteers whilst lone working in the community, all known or identified risks will be recorded and shared in line with our policies.

As part of the risk assessment, we should use the 'Clutter scale' in the Self Neglect and Hoarding Norfolk Safeguarding Adults board paper [Self-neglect and hoarding | Norfolk Safeguarding Adults Board](#)

Keith's story - A personal and touching film about hoarding <https://www.youtube.com/watch?v=fhmftpwNZc>

Notifying Volunteers of Identified Risks

Following assessment of any identified risks and agreement that the provision of the service can go ahead, the volunteer will be informed of any identified risks along with any restrictions that have been put in place. The volunteer will need to confirm that they understand the risk and are happy to support the service user.

Note to staff – All risks must be noted on the risk assessment tab on CLOG

COVID 19

The latest government guidance in full can be found here: [Living safely with respiratory infections, including COVID-19 - GOV.UK \(www.gov.uk\)](#) We are following the latest government guidance and have no additional restrictions in place. Due to working with vulnerable people, we should mitigate any infection risk where possible and respect the wishes of anyone we see face to face e.g. if they would like us to wear a mask and you are happy to do so. Care homes may have their own rules around visits and our guidance is in addition to any guidance the care home has. All guidance provided by a care home should be respected and followed.

COVID Testing and vaccinations - If you wish to test prior to a visit and are unable to obtain a free test please speak to your coordinator **before** you incur a cost to do this.

You do not have to let us know if you have been vaccinated, taken a test or the result

Transporting a Service User and Manual Handling

Volunteers and staff are unable to transport a service user in their car even if they have the correct insurance.

No staff or volunteer should help lift service user or push them in a wheelchair unless they have provided AUKN with an up-to-date manual handling certificate. AUKN will not pay for a manual handling course unless agreed with a manager.

Personal Safety

Age UK Norfolk have a responsibility under the 'Lone Workers Policy' to provide you with support should you ever feel unsafe or in danger whilst out on a visit.

Visits should only be completed in office hours (10am-4pm); this is so that you have support available from Age UK Norfolk staff. All visits must be logged as per the procedure in the Volunteer Handbook using CLOG or the Microsoft form link which can be found in the Volunteer Hub [Volunteer Information Hub](#)

Every effort will be made to assess risks associated with individual cases; however, volunteers always need to remain vigilant for their own personal safety. Any issues that arise should be discussed with their coordinator at the earliest opportunity.

To mitigate any risks:

Ensure you follow the guidance in the lone working policy for example:

- Ensure you have the relevant Age UK Norfolk staff contact information with you.
- Park in a well-lit area if possible, so that the vehicle is safe, and you will not be at risk when you leave or return to it.
- Be alert when negotiating difficult access routes If it is dark carry a torch if possible.
- Ask that pets in the house are under control.
- Ensure the exit route is clear and always place yourself between the service user and the exit.
- If anyone becomes angry or makes you feel uncomfortable **then leave immediately**.
- If someone falls, **do not attempt to lift them**, but call for assistance.
- If we need to visit an empty property, perhaps if the service user has moved to a care home and need paperwork etc. there must be at least 2 people from **different** organisations. If this is not possible management sign off must be given.

• **Note to staff** – Once an appointment has been arranged it is the responsibility of the person visiting to update charity log of the date and time on charity log marking the appointment as **very high priority** on the Action Priority Rating field showing the time and date of the visit, so this is clearly visible in your action list. All volunteers without CLOG access will log their visit on the Microsoft form mentioned above.

Information, Advice, Signposting and Referring

Information

Information is providing facts in response to a question. Information is not person specific and would be the same for every service user/member.

If you are asked for any information to be given, please pass on our I&A teams contact details or contact our I&A team directly who will contact the member. (advice@ageuknorfolk.org.uk / 0300 500 1217)

Advice

Advice is to guide or recommend options in relation to a problem unique to a person.

Advice at all times should be provided by our I&A team and not the companion.

Signposting

Signposting is when a service user is given information of other organisation(s) that would be able to assist them. The service user then contacts the organisation themselves.

Referral

This is when the volunteer contacts the organisation on behalf of the service user and makes an appointment for them, with the service user's consent. If the need arises for this, please contact the staff team before taking any action.

Referrals and active cases

Referrals into the service

Referrals come in from 2 places.

1. Norfolk County Council/Other professional – the professional will complete our referral form which can be found on our website [Age UK Norfolk | Our Services](#) within the Travelling companionship Service Information. (They will either email this to us or upload the referral onto the NCAN referral system)
2. Via our Information and Advice team, anyone can contact the I&A service to request support from our service, it could be the service user, a concerned family member or a professional. I&A will call the service user to obtain consent to make a referral and confirm suitability for the service before they make the referral to us.

Allocation process

The coordinator will consider who has availability and who would be a good match (Personality, location, skills etc.) Approach the volunteer to discuss the case and if they agree arrange a visit at a mutually suitable time.

Note to staff - You can share with the volunteer the proposed goals list, the referral form, any risks and the service user's information. The coordinator will assign the volunteer a job card on CLOG and make them the usual volunteer

Initial Visit to the service user.

The coordinator will discuss how they are feeling and will compile a list of goals that the service user would like to achieve. E.g. – To take the bus into town or to travel to and join a local group. Explain that you need to ask a few basic questions about how they are feeling and what they would like the service to achieve. Explain that we have to ask certain questions to satisfy our funding requirements.

Occasionally the coordinator may refuse to offer the service to the potential service user at this point. One reason for this may be due to the person not having the mental capacity to understand the service and therefore unable to instruct us. Other reasons may include an assessment that the situation is unsafe for a volunteer, that the requirements of the service user do not fit with what the service or that there are third parties involved that would make it difficult for us to offer the help and support required.

Tips for visiting

Give your full name and explain that you work/volunteer for Age UK Norfolk. Ascertain how the service user would like to be addressed – Mr/Mrs/Ms or by their first name.

- If this is an initial visit, or if the service users memory is poor you may consider recapping the following
- Provide an overview of the service including:
 - support provided by volunteers,
 - all companions are DBS checked and referenced,
 - All discussions remain confidential, unless a potential Safeguarding issue is identified which would have to be reported.
 - The service is flexible and once an companion is allocated, visiting times/ dates etc. will be arranged between service user and companion.

Note to staff - As soon as possible write up the visit on CLOG, record consent, any known risks and tasks.

Introduction of Volunteer to service user

1. Unless a home visit by the coordinator is necessary the coordinator will call the service user to let them know they have found them a volunteer who will call them. You can pass on the volunteer's number and advice that they will likely call from a withheld number.
2. Let the service user know that all journeys can be arranged directly with the volunteer now at times suitable with them both.
3. The coordinator will then provide ongoing support to volunteer on an 'as and when basis but maintain regular update contact with the volunteer, who after each journey submit a report to their coordinator. The coordinator will provide a report form to the volunteer for each client. They will then read and action any issues once a completed form has been received.

Tips on supporting someone who is grieving

Often clients come to us for support because they are isolated after losing a loved one. Below are some items that should be considered when supporting someone that has been bereaved.

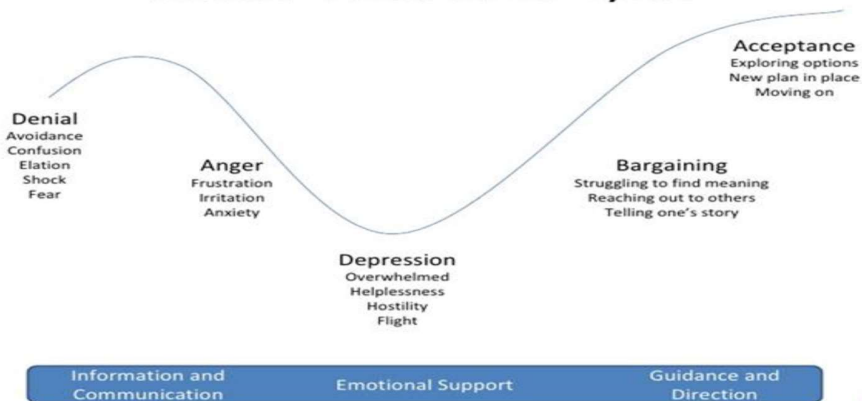
What Does It Mean to Grieve?

Grief is exhausting. Grief is a natural process but is an individual experience. Grief can incorporate many different emotions such as guilt, anger, numbness, loneliness, anxiety, hopelessness, fear, regret, depression.

Consider that someone could be grieving for the person who has passed away as well as the loss of any roles they may have played e.g a full time caring role

Grief can also show irrational displays of emotion, a small item in everyday life such as a lightbulb going could trigger the service user.

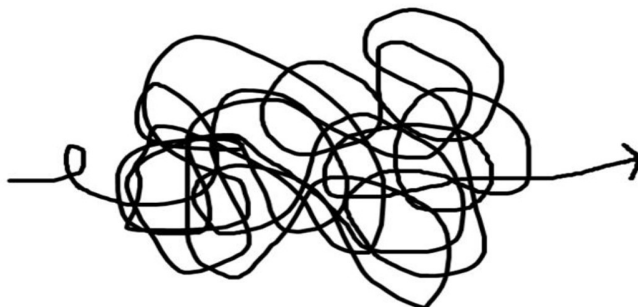
Kübler-Ross Grief Cycle



How we would like grief to be



What grief is really like



Tips to help someone who is grieving.

Listen actively, let them talk and share the relationship they had with the deceased. Invite the person to talk about their loved one. Be prepared for some silences. Refer back to things they have said, it shows that you have been actively listening. Realising you may not always be the best person to support them.

Remember that effective communication can be broken up like this.

- Words: 7%
- Nonverbal: 55%
- Tone Volume and inflection 38%

Empathy v Sympathy - [Brené Brown on Empathy - YouTube](#)

Ensure that the person is not harbouring guilt when they had no options i.e., not being with that person when they died.

How can you bring a conversation to a close

- Ideally set a boundary at the start of a call/visit.

How can we protect ourselves?

- Realising it is not your grief.
- Observe and listen but do not carry that person's grief or take it on

Being aware of our own limitations

- Knowing your own constraints (time, hours, capabilities etc)
- Keep a check on how you are.
- can you help others? We all have a certain capacity - know yours

Useful literature

https://www.ageuk.org.uk/globalassets/age-uk/documents/information-guides/ageukig03_when_someone_dies.inf.pdf

<https://www.gov.uk/when-someone-dies>

Volunteer Reporting

Journey Reports

Volunteers will be provided a link to complete after each journey.

It is important that one of these should be completed for each service user after each journey. These form the basis of our recording and monitoring processes and are a key factor in safeguarding both the service user and volunteer and form part of our funding requirements.

The information you provide enables us to produce reporting for our funders, CEO and Trustees' as well as updating your coordinator on individual cases.

Note to staff Coordinators are responsible for transferring information from the Microsoft Form link to CLOG.

Closing a case

We usually close a case as all goals have been achieved. Support should last no longer than 6-8 weeks.

The Companion would discuss this with the service user if both agreed to close the case the coordinator would make a final visit/phone call and will them and if suitable complete the end of support survey. Age UK Norfolk's telephone number should be left so the service user can make contact as and when further support is needed.

In certain circumstances we may have to close a case prematurely, this may happen for a variety of reasons, for example.

- If a service user loses mental capacity.
- If a service user is presenting false information.
- If a service user is acting unlawfully.
- If a service user is abusive in anyway.
- If the environment/situation becomes unsafe.
- If the circumstances of the case are beyond Age UK Norfolk's limitations.
- Any other situation that becomes untenable for Age UK Norfolk

If any of the above occur, after giving the situation due consideration, a letter will be sent from Age UK Norfolk explaining the situation and giving comprehensive reasons for the termination. Depending on the circumstances it may be appropriate to offer the service user our Complaints Procedure or complete this in person by the coordinator or manager.

In all cases the companion needs to end all contact with the service user and both parties need to be advised that if they continue a relationship this is outside of AUKN and there will be no insurance cover in place.

Note to staff – Don't forget to update CLOG - Complete all open actions, add in the referral closed date in the summary tab, complete the job card. (Be careful not to close a job card for another service), complete the

Deceased service users

Check the history on CLOG and ensure you email anyone with a relevant outstanding action that the service user is deceased so they can take any action for their service.

Make the service user deceased on CLOG, this will end all projects and close all actions, so it is important that you let anyone know who has an open case with the service user. E.g. Befriending if they have an open case on CLOG or any active workers on a case that you are aware of e.g. a social worker.

Frequently Asked Questions

My member is interested in a will, how can AUKN support them?

If a service user has no valid Will in place and would like one, we would always recommend that a solicitor or reputable Will writer be used. The best solution here would be to give the member the I&A contact information or ask them if they would like you to have the I&A team call them. If this is the case, let the staff team know.

It is recognised that when a service user has received a service from AUKN over a long period of time their appreciation may be shown in the form of a bequest to an individual member of staff or volunteer. The member should be informed that individual staff or volunteers, where the contact and relationship relate to Age UK Norfolk business, should **not** be named in that person's Will.

A member should be made aware that as a charity Age UK Norfolk (charity number 1077097) welcomes legacies to support our charitable work.

Volunteers cannot act as a witness to a Will.

My service user has unfortunately passed away, what should I do?

If we visit and find the service user deceased/nonresponsive 999 should be called immediately

If a volunteer is made aware that a service user they are supporting has passed away, they should inform their coordinator as soon as possible.

My service user has agoraphobia, can we still support them?

Agoraphobia means *'having an extreme or irrational fear of entering open or crowded places, of leaving one's own home, or of being in places from which escape is difficult.'*

It is unlikely we will be able to support someone with agoraphobia as to be supported with this they may need a trained professional. However we will look at each case individually.

What to do if things go wrong

Things may go wrong for many reasons, often this will be out of your control. If this happens make detailed notes of the situation and make your coordinator aware of the situation. If it is urgent update your coordinator or the team immediately.

If appropriate refer the service user to the complaint's procedure.

Concerns for your service user

If you are concerned for your service user and there is no response to visits or telephone calls the first thing to do is to contact your coordinator. The most common reason for this is that the service user has been taken into hospital and we have not been made aware. The coordinator will then review the file and make some enquiries. This could be with a care agency if we know they are involved or with Social Services/Police 101 if we are concerned and all other options have not provided a response.

Social services/101 will not be able to let us know where the service user is (hospital etc) but they would be able to let us know they are safe.

Working with people who do not engage

We do often work with people who struggle to engage. We will do our best to engage with these service users however if we are unable to help, we will end the service.

Refer to appendix section for a “Toolkit” for when a service user is not engaging.

If you continue to struggle with a service user who will not engage, please speak to your coordinator.

Useful Information

| | | |
|---|--|--|
| Age UK Norfolk Service Guide | Age UK Norfolk Service Guide – Volunteers and staff should be familiar with the full range of Age UK Norfolk’s services and aware of any referral criteria. | https://www.ageuk.org.uk/norfolk/our-services/ |
| Age UK Norfolk and National Information Resources | This is an index of our factsheets; all factsheets can be found on our website and can be shared with volunteers and service users. | https://www.ageuk.org.uk/norfolk/ https://www.ageuk.org.uk/wp-assets/globalassets/norfolk/factsheets/factsheet-index-march-2019.pdf |
| Lion fridge pots | This is a simple idea designed to encourage people to keep their basic personal and medical details on a standard form and in a common location – the fridge! | http://www.lions105sw.org.uk/district-projects/message-in-a-bottle/ |
| Cold caller stickers | These are free from the police or trading standards | https://www.norfolk.police.uk/advice/home-safety/rogue-traders-cold-callers |
| Parking Permits | We hold parking permits for Norwich city centre and Great Yarmouth. These are for use by staff and are held at head office and should be signed out when taken | |

Appendix

| |
|----------------------|
| Document Name |
| Engagement Toolkit |

Document Control

| Last Updated date | Updated by | Changes made | Date shared with staff and volunteers |
|-------------------|------------|---|---------------------------------------|
| Date finished | Jen Field | New document | 23/09/2022 |
| 18/07/2024 | Jen Field | Reviewed and updated entire manual | 23/06/2024 |
| 10/01/2025 | Jen Field | Updated staff Team list (Remove HT) | |
| 10/01/2025 | Jen Field | Personal Safety – updated to reflect the updated policy | |
| 10/01/2025 | Jo Asbury | Updated appendix – Engagement Toolkit | |