

## Client Engagement Letter

Thank you for asking Z2K to help you. In order to ensure that we provide you with the best service possible, it is important that we both understand exactly what we expect from each other. Please make sure you read and understand this letter as you may be referred to it later.

### Who are Z2K?

Zacchaeus 2000 Trust, or Z2K for short, is an anti-poverty charity which works to support those on low incomes living in London by providing them with practical advice and support, and by campaigning to change the law. We do not charge for any of our services and some of the work is done by volunteers, who are not paid. Our advice and casework are supervised according to our Supervision Policy.

### What Z2K can do to assist you?

Issues we can help you with:

- Problems with means tested benefit, housing benefit , rent arrears ,council tax
- Appeals against any decision of DWP, including concerning entitlement to a means tested benefit or DLA, PIP and generally help if you should be receiving more benefit than you are getting

### **What we can do for you**

- advise you about your rights and obligations
- make representations on your behalf both on the telephone and in writing
- help you complete a disability benefits application form through our form filling service which is subject to availability
- pursue, on your behalf, a complaint about how you have been treated, if this is appropriate
- Represent you at a tribunal subject to availability

### **What we cannot do:**

- We cannot guarantee any particular outcome for your problem
- We cannot guarantee any representation or accompanying you to an appointment or assessment
- We cannot guarantee to take your case on if we do not think you have a chance of success
- We cannot guarantee to find or provide an interpreter if you have difficulties with English
- We cannot accept any gifts from you at any point.
- **We cannot guarantee representation for any tribunal.** We use various pro bono lawyers, in house caseworkers and volunteers to deliver tribunals, but our availability is sometimes limited.

**Patrons:** The Most Revd & Right Hon the Lord Archbishop of Canterbury; Justin Welby ; The Duke of Richmond and Gordon; Victoria, Lady Getty; Sandi Toksvig; Sir Henry Brooke; Lady Antonia Fraser D.B.E.; Jeremy Paxman; Dr Shuja Shafi; HHJ Jan Luba QC.

**Founding Patrons:** 1996–2000: The Most Revd and Rt Hon. Lord Runcie; 1996–2009: Sir John Mortimer CBE QC

The Zacchaeus 2000 Trust is a company limited by guarantee registered in England no. 05442501 with registered office 1st Floor Rear, 34 Grosvenor Gardens, London SW1W 0DH. Registered Charity No. 1110841

Z2K  
10 Buckingham Palace Road  
London SW1W 0QP  
T: 020 7259 0801  
(10am – 12pm, 2pm – 3pm, Mon – Fri)

E: [admin@z2k.org](mailto:admin@z2k.org)  
[www.Z2K.org](http://www.Z2K.org)

What we will expect of you:

- to actively engage with our service and respond to all requests for information
- to act in a reasonable and polite manner in all dealings with our staff
- not to arrive at the office without an appointment as you will be turned away
- not to call us repeatedly when we have told you that we will contact you when we receive a response.
- to accept our advice. If you prefer not to do so then we may not be able to continue to help you
- to try to bring someone with you to interpret if necessary
- to bring any letters , or other documents, that may be relevant to your case when you come to see us.

What you can expect from Z2K

We will:

- do our best to help you whilst acting in a fair and reasonable manner towards you
- return any telephone call from you within 2 working days
- reply to all relevant correspondence within 5 working days. If communication required by post you need to inform your caseworker and this will be sent via 2<sup>nd</sup> class post.
- contact you as soon as we have an update on your case

We will **not**:

- discriminate against you for reasons of skin colour; gender; religion; disability; sexual orientation; or other reason
- tolerate any discrimination against others
- ask you to do anything which is unlawful or might cause you financial or other harm

We would like to make it clear that when we help you we are not acting as lawyers. If we think you need legal advice we will try to find solicitors to take on your case.

## How Z2K manages your information (Z2K Client Privacy Notice)

- We collect and process a range of information about you on the basis of legitimate interest under the General Data Protection Regulation (GDPR) in order to provide you with this service.
- Z2K is the data controller with office located at 10 Buckingham Palace Road, SW1W 0QP. Please email or contact the Office Manager, Lilian Lee at [lilianlee@z2k.org](mailto:lilianlee@z2k.org), 02072590801 for all matters regarding your privacy.
- The information includes:
  - Your name, address and contact details, including email address and telephone number, date of birth and gender;
  - Your medical information related to your tribunal
  - Your personal history related to your tribunal
  - Information of your right to public funds
  - Information on your housing, or welfare benefits
  - Information on your personal needs
- We will process your data (i.e. collect, store and use) according to the requirements of the GDPR at all times and shall endeavor to keep your personal data up-to-date, ensuring its accuracy and will not keep it for longer than it is required.
- We will only disclose details of your case and medical history to our staff, volunteers and members of organisations that provide representation on our behalf, or to the tribunals service, or to health and other professionals you have given us permission to contact.
- There are special circumstances where we may have to release details of your case:
  - As an Advice Quality Standard accredited organisation, we are subject to an external assessment every two years on the quality of our work, and will have to give the external assessors access to our case files to verify the quality of our advice and file management. The external assessors are required to maintain confidentiality in relation to your file and it is important to note that they are assessing us as an organisation and not you as an Individual. If you would prefer that your file did not form part of this independent assessment, please notify your Lilian Lee of your preference in writing.
  - We will have to release your case file if required to by the law
  - We will have to release information about you if there is a safeguarding concern and we are lawfully required to raise this with safeguarding agencies such as the local authority's adult social care team. We will follow the Z2K Adults Safeguarding policy and procedure.
- We will store your data in accordance with the requirements of the GDPR. Your data is stored on Z2K's IT system or filing drawer, which can be accessed by those working on all Z2K projects .Other than office equipment and filing drawers in Z2K's office, Z2K uses other IT systems to process your data such as cloud based Salesforce for case management, and Microsoft Office 365 for its emails and document storage. Z2K aims to keep your data within the European Economic Area (EEA). Where Z2K need to use the services of an IT provider who has to have your data transferred outside the European Economic Area (EEA) for processing, for example, Salesforce, Z2K will ensure that the provider meets the requirements of GDPR, for example, the country has an adequate level of protection for

personal data by The European Commission or if the provider is based in the US, it is part of the EU-US Privacy shield.

- Z2K takes the security of your data seriously. It has internal policies and controls in place to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is accessed only by Z2K.
- If we cannot assist you, we will keep a record of your first name, last name, and date of birth, and information related to any advice and/or casework you received from us. All other information that is irrelevant will be destroyed.
- We are an Advice Quality Standard accredited organisation and we are required to keep your case file for 7 years from the date your case file is closed. This is both to protect you (who may discover years later that our advice was inaccurate and therefore seek redress) and to protect us (without records we will have no evidence to check whether the case is correct or not).
- You can access your case file kept by Z2K by completing a subject access request form and we will have 30 days to provide the information from the date the form is received. We have the right to charge a fee or refuse if the request is unfounded or excessive.
- We aim to keep your information correct and up to date. You should inform us as soon as possible by phone, email or in person when you find an information of yours is incorrect and we will rectify it within 30 days.
- You can ask for your information to be deleted from Z2K's database by completing a case deletion form. However, as mentioned above, we are required to keep your case file for 7 years from when it is closed. The senior casework manager will consider what information can be deleted, or have the information stored out of the database. This may lead to incomplete advice from us, or us not being able to continue to work with you.
- You can, at any time, request for us not to use or not to release any information about you. You can withhold any information from us. However, this may lead to inaccurate or incomplete advice from us, or result in us not being able to continue working with you. Your caseworker will be able to let you know.
- You can, at any time, request for us to stop providing you with advice or work on your case. You need inform us as soon as possible by phone, email or in person.
- You can, at any time, request for pass on your case file to another organisation. You will need to inform us by phone, email or in person.