

Confidentiality Policy

Policy number	008	Version	V2
Drafted by	Denise Luscombe	Approved by Board	4 th August 2025
Responsible person	Chair	Scheduled review	August 2027

Introduction

Information management systems rely on any necessary restrictions on the free circulation of information being respected by those into whose hands the information is entrusted.

Purpose

The purpose of this document is to provide a framework for PRECI in dealing with confidentiality considerations.

Policy

PRECI collects and administers a range of information for a variety of purposes. Some of this information is restricted in its circulation for commercial, privacy, or ethical reasons.

PRECI will place the minimum of restrictions on the information it holds but will ensure that such restrictions as are considered necessary are observed by its staff and volunteers.

Confidentiality Procedures

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Responsibilities

PRECI's Board is responsible for the implementation of this policy.

PRECI's Board or Director, as designated by the Board, is responsible for reviewing this policy every 2 years or as a need arises.

All Directors, volunteers and employees are responsible for observing confidentiality procedures in their work for PRECI.

Processes

The records management processes of the organisation shall incorporate procedures for designating information confidential.

Restrictions

PRECI will place restrictions on the information it holds when the information:

- is commercial in confidence;
- concerns the privacy of its staff, volunteers, clients or customers;
- requires protection to safeguard the intellectual property of the organisation.

Staff dealing with restricted material will be instructed in the recognition of material falling under these headings.

Identification

Any information on which restrictions have been placed shall be as far as possible clearly identified on the document or file. Where categories of information, rather than individual documents, are restricted, this restriction will be conveyed to staff and volunteers dealing with this information.

Protection

Staff of the organisation, and volunteers dealing with restricted information, shall be required to sign a confidentiality agreement (see Appendix A)

Training

All staff will be instructed in the requirements of this policy.

RELATED DOCUMENTS

- Privacy Policy
- Records Management policy
- Volunteer Management Policy

APPENDIX A

CONFIDENTIALITY AGREEMENT

I agree to hold confidential all information that PRECI has deemed confidential or placed restrictions on, and to release it to persons outside the organisation only when authorised by the organisation and subject to any conditions set by the organisation.

I undertake to:

- 1) Access information held by the organisation only when necessary to the performance of my assigned duties;
- 2) Make copies of restricted information only when necessary to the performance of my assigned duties;
- 3) Oversee the storage and handling of restricted information to minimise the risk of its diversion into unauthorised channels;
- 4) Take reasonable care to properly secure confidential information on my computer and will take steps to ensure that others cannot view or access such information;
- 5) Not disclose my personal password(s) to anyone without the express written permission of PRECI, or record or post it in an accessible location, and will refrain from performing any tasks using another's password unless provided with clear authority; and
- 6) Notify my supervisor if I have reason to believe that my access codes and passwords have been compromised.

Signed _____

Date _____