

Confidentiality Policy

1. General Principles

1.1 The St Andrews Preservation Trust Ltd, hereon referred to as “The Charity”, recognises that colleagues (employees, volunteers, trustees/directors, committee members, consultants, secondees and placements) gain information about individuals and organisations during the course of their work or activities. In most cases such information will not be stated as confidential and colleagues may have to exercise common sense and discretion in identifying whether information is expected to be confidential. This policy aims to give guidance but if in doubt, seek advice from the Administrator.

1.2 During the course of employment or other working or voluntary arrangements, colleagues may also have access to and be entrusted with 'confidential information'.

1.3 'Confidential Information' means any and all information concerning the business of the Charity and its finances, including but not limited to:

- procedures and processes,
- intellectual property rights,
- its client/customer/member/service user, partner and supplier lists,
- details of prospective clients/customers/members and/or service users,
- its dealings, transactions and affairs,
- its services and products,
- contact details of clients/customers/members/service users, partners and suppliers,
- financial projections,
- targets and accounts,
- costings and commercial activities,
- service or product development and future plans
- and similar information concerning the Charity's clients/customers/members/service users, partners and suppliers.

1.4 Colleagues shall not, during the period of their employment or whilst engaged with the Charity, use or divulge or disclose any 'Confidential Information'. The exception to this rule shall be where such divulging or disclosure is in the proper course of their duties. Colleagues shall not at any time and in any circumstances, after the termination of their employment or their arrangement with the Charity, use, divulge or disclose any Charity information - whether for their own benefit or for that of any other person or organisation - except with the prior written consent of the Board.

1.5 During the continuance of colleagues' employment or working arrangement with the Charity, they shall use their best endeavours to prevent the divulgence or disclosure by third parties of 'Confidential Information'.

1.6 Colleagues are able to share information with their line manager, supervisor or Board member in order to discuss issues and seek advice.

1.7 Colleagues will avoid exchanging personal information or comments about individuals with whom they have a professional relationship.

1.8 Talking about the private life of a colleague is to be avoided at all times, unless the colleague in question has instigated the conversation.

1.9 Colleagues will avoid talking about organisations or individuals in social settings.

1.10 Colleagues will not disclose to anyone, other than their line manager, supervisor or Board member, any information considered sensitive, personal, financial or private without the knowledge or consent of the individual, or a senior manager or Board Member.

1.11 There may be circumstances where colleagues would want to discuss difficult situations with each other to gain a wider perspective on how to approach a problem. The organisation's consent must be sought before discussing the situation, unless the colleague is convinced beyond doubt that the organisation would not object to this. Alternatively, a discussion may take place with names or identifying information remaining confidential.

1.12 Where there is a legal duty on the Charity to disclose information, the person to whom the confidentiality is owed will be informed that disclosure has or will be made.

1.13 When photocopying or working on confidential documents, colleagues must ensure people passing do not see them. This also applies to information on computer screens. Colleagues should therefore uplift documents timeously, and ensure that computers and other devices are locked when left unattended for any period of time with password secure.

Communication and Review

2.1 This policy will be communicated to colleagues (employees, volunteers, trustees, directors, committee members, secondees and placements) during the induction period and at relevant meetings.

2.2 Any breach of this policy is likely to constitute a serious disciplinary offence which could constitute gross misconduct for which the employee could be summarily dismissed i.e. dismissed without notice or pay in lieu of notice. For volunteers, this could lead to the termination of the Volunteer Agreement. Any breach could also cause serious damage to the reputation and standing of the Charity.

2.3 Where you know or suspect that a breach of this policy has occurred, whether deliberately or accidentally, you must inform your line manager or supervisor. Any person found to have knowledge of a breach of this policy without reporting it shall be deemed to be in breach of this policy.

2.4 This policy will be reviewed every two years.