



The St Andrews Preservation Trust Limited

Confidentiality Policy

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Drafted by:	Miss Annie Birrell	Approved by Board on:	Insert date
Responsible person:	Miss Annie Birrell	Scheduled review date:	Insert date

The St Andrews Preservation Trust Limited is committed to providing a confidential service to its “users”. The term “user” refers to any member of the Trust, Trustee, member of staff, student assistant, volunteer, external researcher, service provider, or other contact associated with the Trust. No information given to the organisation will be shared with any other organisation or individual without the user’s expressed permission.

For the purpose of this policy, confidentiality relates to the transmission of personal, sensitive or identifiable information about individuals or organisations (confidential information), which comes into the possession of The St Andrews Preservation Trust limited through its work.

The St Andrews Preservation Trust Limited holds personal data about its “users” which will only be used for the purposes for which it was gathered and will not be disclosed to anyone outside of the organisation without prior permission.

All personal data will be dealt with sensitively and in the strictest confidence internally and externally.

Purpose

The purpose of the Confidentiality Policy is to ensure that all “users” understand The St Andrews Preservation Trust Limited’s requirements in relation to the disclosure of personal data and confidential information.

Principles

- All personal paper-based and electronic data must be stored in accordance with the Data Protection Act 1998 and must be secured against unauthorised access, accidental disclosure, loss or destruction.
- All personal paper-based and electronic data must only be accessible to those individuals authorised to have access.



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Statistical Recording

The St Andrews Preservation Trust Limited is committed to effective statistical recording of the use of its services in order to monitor usage and performance.

All statistical records given to third parties, such as to support funding applications or monitoring reports for the local authority shall be produced in anonymous form, so individuals cannot be recognised.

Records

All records are kept in locked filing cabinets. All information relating to “users” will be left in locked drawers. This includes notebooks, copies of correspondence and any other sources of information.

Breaches of Confidentiality

The St Andrews Preservation Trust Limited recognises that occasions may arise where a person associated with the Trust feels they need to breach confidentiality. Confidential or sensitive information relating to an individual may be divulged where there is risk of danger to the individual, a volunteer or employee, or the public at large, or where it is against the law to withhold it. In these circumstances, information may be divulged to external agencies e.g. police or social services on a need to know basis.

Where a person associated with the Trust feels confidentiality should be breached the following steps will be taken:

- They should raise the matter immediately with the Line Manager (Trustee responsible for the relevant function).
- They must discuss with the Line Manager the issues involved in the case and explain why they feel confidentiality should be breached and what would be achieved by breaching confidentiality. The Line Manager should take a written note of this discussion.
- The Line Manager is responsible for discussing with the person what options are available in each set of circumstances.



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- The Line Manager is responsible for making a decision on whether confidentiality should be breached. If the Line Manager decides that confidentiality is to be breached then they should take the following steps:

The Line Manager should contact the Chairman of the Board of Trustees in the first instance, or a Vice Chairman. The Line Manager should brief the Chairman /Vice Chairman on the full facts of the case, ensuring they do not breach confidentiality in doing so. The Line Manager should seek authorisation to breach confidentiality from the Chairman /Vice Chairman.

Following consultation, involving the Chairman and a Vice Chairman, if they agree to breach confidentiality, a full written report on the case should be made and any action agreed undertaken. The Line Manager is responsible for ensuring all activities are actioned.

If the Chairman and a Vice Chairman do not agree to breach confidentiality then this is the final decision of The St Andrews Preservation Trust Limited.

Legislative Framework

The St Andrews Preservation Trust Limited will monitor this policy to ensure it meets statutory and legal requirements.

Ensuring the Effectiveness of the Policy

All members of the Board of Trustees will receive a copy of the confidentiality policy. Existing and new workers will be introduced to the confidentiality policy via induction and training. The policy will be reviewed annually and where appropriate, amendments may be proposed and agreed by the Board of Trustees.

Non-adherence

Breaches of this policy will be dealt with under the Grievance and/or Disciplinary procedures as appropriate.