

## Confidentiality and Privacy Policy and Procedure

Policy Approved on: 20/11/2025

Policy Review Date: 20/11/2026

### Introduction

The purpose of this policy is to outline Creative at HeART CIC's approach to confidentiality and privacy. It sets out how we protect the information entrusted to us by children, young people, families, and partner organisations, and defines the standards expected from everyone connected with our work.

Confidentiality underpins the trust that makes our creative and wellbeing activities effective. It ensures that all participants, families, and professionals we work with feel safe, respected, and supported.

This policy applies to all directors, employees, therapists, volunteers, contractors, and associates of Creative at HeART CIC and continues to apply even after their involvement with the organisation ends.

### Responsibilities

The Board of Directors holds overall responsibility for ensuring compliance with relevant laws and standards relating to confidentiality and privacy — including the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018, and Human Rights legislation guaranteeing the right to privacy.

The CEO (or CEO) is responsible for the effective implementation of this policy and ensuring all staff, volunteers, and associates adhere to it.

In particular, the CEO will ensure that:

- All staff and volunteers understand their responsibilities regarding confidentiality and data protection.
- Effective systems are in place to monitor and manage compliance.
- Training is provided to support safe information handling.

### General Principles

Creative at HeART CIC recognises that the work we do often involves sensitive personal information. We hold data about children, young people, families, and partners only where necessary to deliver our mission of supporting emotional wellbeing through creativity.

We understand that confidentiality is key to building and maintaining trust, and we handle all information with the utmost care, respect, and professionalism.

### **Information We Record**

Creative at HeART CIC collects and stores personal information for three main purposes:

1. Creative and Wellbeing Records – to ensure that children, young people, and families are supported appropriately and safely.
2. HR and Governance Records – for the management of staff, volunteers, directors, and contracted partners.
3. Supporter and Partner Records – to manage relationships with funders, donors, schools, hospitals, and partner organisations.

Only information relevant to the purpose of the engagement is collected.

### **Record Keeping**

All personal data is stored securely using approved, password-protected, and encrypted systems. Cloud-based and CRM systems used by Creative at HeART CIC are compliant with data protection legislation. Paper records, where used, are stored in locked cabinets in restricted-access areas.

The type of information collected depends on the nature of engagement and is only retained for as long as necessary.

### **Handling of Sensitive Information**

Because our work may involve vulnerable children and families, special care is taken to protect sensitive information. This includes:

- Obtaining written and verbal consent from parents or guardians before processing personal data.
- Storing factual and minimal notes securely.
- Restricting access to authorised staff and therapists only.
- Encrypting and anonymising information shared externally.
- Sharing information only when there is a legal duty or a vital interest to protect an individual's safety.

Sensitive client data is retained for seven years before being securely deleted or destroyed.

### **Staff and Recruitment Records**

Creative at HeART CIC uses personal data about staff, volunteers, and directors to manage employment, volunteering, or contractual relationships; fulfil legal obligations; and ensure safeguarding and suitability for working with children and young people.

This information is processed lawfully and confidentially in line with employment and data protection legislation.

## **Supporter and Partner Data**

We process personal data from supporters and partners for legitimate purposes, such as managing donations, funding relationships, or collaborative projects, and sharing updates and outcomes when consent has been provided.

We retain financial data in line with HMRC requirements (typically up to seven years) and only for lawful purposes.

## **Sharing of Information**

**Internal Sharing:** Information is considered confidential within Creative at HeART CIC. It may only be shared internally on a need-to-know basis to support service delivery.

**External Sharing:** We will only share identifiable information externally when the individual (or their parent/guardian) has given explicit consent, or there is a legal or safeguarding obligation to do so. Any information shared externally will be anonymised or encrypted wherever possible.

## **Disclosure to External Agencies**

Requests for client information must be made formally in writing and include legal authorisation (e.g. a Court Order or Police disclosure request). All responses are handled by senior staff and shared securely via encrypted email or approved systems.

## **Breaching Confidentiality**

Information may be disclosed without consent when there are safeguarding concerns about a child, young person, or vulnerable adult; it is in the best interests of the individual to share with relevant professionals; or it relates to serious criminal offences such as terrorism or money laundering.

Any decision to breach confidentiality must be authorised by the CEO (or delegate) and recorded in full.

## **Volunteers**

Volunteers must treat all information shared with them as strictly confidential and must not share or discuss personal information outside the organisation.

If a volunteer becomes concerned about someone's safety or wellbeing, they must speak to the Designated Safeguarding Lead (CEO - Dean Ashworth) immediately.

## **Access to Information**

Individuals have the right to request access to information held about them under the Data Protection Act 2018. Requests must be made in writing to the CEO and will be acknowledged within 14 days. Some information, such as that relating to safeguarding or third-party disclosures, may be withheld where legally necessary.

## **Monitoring and Evaluation**

Creative at HeART CIC collects anonymised data and feedback for reporting and evaluation purposes. Reports to funders or partners will never include identifying details unless explicit consent has been obtained.

## **Data Protection**

Creative at HeART CIC complies fully with the UK GDPR and Data Protection Act 2018.

Personal data must always be:

- Processed fairly and lawfully.
- Used only for stated, legitimate purposes.
- Accurate, relevant, and not excessive.
- Kept secure and only as long as necessary.
- Accessible to the individual upon request.

## **Security of Information**

We maintain strict information security standards: electronic files are password-protected; sensitive paper files are locked; data sharing occurs only through encrypted systems; and all devices are managed and reviewed for compliance.

## **Complaints and Breaches**

Any suspected breach of confidentiality or misuse of information will be treated as a serious matter. Staff or volunteers who fail to comply may face disciplinary action, and ex-employees may face legal consequences. Service users may complain under the Creative at HeART CIC Complaints Policy and Procedure.

## **Policy Review**

This policy will be reviewed annually by the CEO and Board of Directors, or sooner if required by law or best practice developments.