**1. Introduction**

Confidentiality is a fundamental principle of any organisation with service users. Throughout a volunteers time in post they are likely to have access to, or have sight of documents and other information that is of a confidential nature, including verbal information. This information may belong to the service users themselves, but it could also include staff, volunteer or organisational confidential information. At all times when information is accessed volunteers are expected to deal with this in a sensitive and confidential manner.

Consider the following:

* Where confidential information is recorded, please consider whether the way volunteers are recording requires them to anonymise the information so that it is not identifiable to a member of the public.
* Where and how confidential records are to be kept safely.
* What the instances are when volunteers are expected to break confidentiality, and how this will be handled (for example when a safeguarding matter occurs).
* Whether volunteers need to undertake GDPR training.
* How much information the volunteer should be sharing about themselves with service users.
* Getting your volunteers to sign a Confidentiality Declaration.

**2. Useful links**

[CPD Online – What is Confidentiality?](https://cpdonline.co.uk/knowledge-base/safeguarding/what-is-confidentiality/)

[NCVO - Writing a data protection policy and procedures](https://beta.ncvo.org.uk/help-and-guidance/digital-technology/data-protection-and-cybersecurity/gdpr-data-protection-law-brexit-and-how-keep-top-your-responsibilities/writing-data-protection-policy-and-procedures/)

**3. Actions**

* Review your responsibilities
* Review whether a change in policy is required
* If required, action Appendix 1 and update staff/volunteers and relevant stakeholders

**4. Additional notes:**

For additional support, please contact:   
Hull CVS at [enquiries@hull-cvs.co.uk](mailto:enquiries@hull-cvs.co.uk) for Hull based organisations

HEY Smile at [volunteering@heysmilefoundation.org.uk](mailto:volunteering@heysmilefoundation.org.ukF) for East Riding based organisations

**5. Disclaimer:**

Whilst we have done our best to source appropriate links and best practice templates to support your organisation, please be aware that due to regulatory changes, these templates may not always be the best example.

We therefore strongly suggest thoroughly reading and amending templates as necessary and conducting periodic reviews of all policies within your organisation to ensure they still meet national guidelines and regulations.

**6. Appendix 1**

**Adopting a new policy**

When using a template, there are several things to remember:

* Your organisation’s name should be referenced throughout. Read it thoroughly, checking for any ‘insert name here’ references or the name of another organisation.
* Any roles mentioned need to be appropriate to your organisation i.e. Chair, Trustee, Child Protection Officer.
* Carefully check for references to other documents or appendices. Are they appropriate to you?  Do they exist?
* Are there references to places? For example, where records are kept or where the first aid box is located will be specific to your organisation.
* Do any processes detailed in the template match your own?  Consider which need to be amended.  The template won’t always meet your needs exactly but could highlight a potential area of improvement that you’d not previously considered.

Before adopting your policy, you’ll need to ensure:

* The policy has been thoroughly reviewed, including by Trustees and the person with responsibility for signing it off.
* Any changes in procedure as a result of the new policy are in place.
* Individuals named within your policy are aware of their responsibilities and are properly equipped to take on that role.

As you implement your policy, you’ll need to:

* Ensure the new policy is signed, dated and a review date is set.  You might want to consider a policy review calendar.
* Make the policy available to your staff, volunteers and service users.  Think notice boards, website etc.
* Make your existing staff and volunteers aware of the new policy and in particular, any key changes they need to be aware of.
* Use the new policy as part of your training and induction for new staff and volunteers.

Above all, it’s important to view your policy as a document that backs up your real and tangible actions, systems and processes.  It should be regularly reviewed and tested as such and should never be relied on simply as one of a suite of documents that a funder might require.

**7.Appendix 2**

**Confidentiality Declaration**

It is a basic principle of **[insert organisation name**] to offer confidentiality to all who engage with us.

In signing this document you are agreeing to uphold the **[insert organisation name]** policy and practice on confidentiality.

Declaration

I have read and understood and will follow **[insert organisation name]** policy and procedures on confidentiality.

Print Name………………………………………………………………..

Signed …………………………………………………………………….

Date ……………………………