



CONFIDENTIALITY POLICIES AND PROCEDURES

Policy Number:		Version:	2
Drafted by:	Strategic Finance Executive	Board approval on:	November 2022
Responsible Person:	Strategic Finance Executive	Scheduled Review Date:	November 2023

INTRODUCTION

Big Yellow Umbrella requires Board members, staff, students, and volunteers to respect and maintain the confidentiality of individuals and the organisation's business generally.

While working in a paid or voluntary capacity for Big Yellow Umbrella individuals may have access to information that is confidential to Big Yellow Umbrella, other agencies that have dealings with the organisation, Board matters or to clients, staff, students, or volunteers. Big Yellow Umbrella relies on its staff and volunteers to maintain confidentiality in all their dealings with Big Yellow Umbrella's information, data, and client records.

PURPOSE

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

POLICIES

Big Yellow Umbrella 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.

Big Yellow Umbrella 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. It is a requirement that either during or after employment with Big Yellow Umbrella, confidential information relating to the business of Big Yellow Umbrella shall not, without prior consent, be directly or indirectly divulged to any person or used for personal gain or for another person's benefit.

This will not prevent an individual from:

- Disclosing information to recognised authorities in relation to concerns about improper conduct, breaches of laws or breaches of duty of care.
- Making a formal complaint to appropriate authorities about an aspect of the organisation's operations
- Disclosing any information that they may be required to disclose by any court or regulatory body or under applicable law.

RESPONSIBILITIES

The Board, Chief Operations Manager and the Strategic Finance Executive are responsible for the implementation and monitoring of all aspects of this Policy and Procedures.

All staff and volunteers are responsible for ensuring they fully comply with this Policies and Procedures by always observing confidentiality procedures.

<https://hrfocus1.sharepoint.com/sites/SUPPORT/Shared Documents/CLIENT WIP/Big Yellow Umbrella/Our Culture/Updates/Confidentiality Policy.doc>

PROCEDURES

The following procedures apply:

Restriction

Big Yellow Umbrella 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 Big Yellow Umbrella

Confidential information includes but is not limited to:

- Information which is marked “Confidential”, or which is described or treated by Big Yellow Umbrella as confidential.
- Personal information as defined in the Privacy Amendment (Enhancing Privacy Protection) Act 2012
- The names and addresses and other personal details of employees, contractors, clients, and suppliers of Big Yellow Umbrella
- Information of a business sensitive nature including client lists, client details, tender applications, and funding agreements
- The terms upon which Big Yellow Umbrella contracts with employees, contractors, clients, and suppliers
- Business plans, funding arrangements, budgets, and forecasts of Big Yellow Umbrella
- Product and service composition and formulae

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

The board, staff, students, and volunteers of Big Yellow Umbrella dealing with restricted information, shall be required to sign a confidentiality agreement on commencement with the organisation.

Training

All staff, students and volunteers will be instructed in the requirements of this policy.

All staff, students, volunteers and Board members are expected to sign [Big Yellow Umbrella's Confidentiality Agreement](#) attached.

RELATED DOCUMENTS
Bullying & Harassment Policy
Clients Record Policy
Code of Conduct Policy
Customer Service Policy
Data Security Policy
Disclosure of Information Policy
Privacy Policy
Recruitment Policy
Risk Management Policy
Social Media Policy
Staff Induction Policy
Use of Electronic Records Policy
Volunteer Management Policy
WHS Policy
Whistleblower Policy

AUTHORISATION

The Board of Big Yellow Umbrella has reviewed and approved this policy.

Signature of Board Secretary: _____

Date of approval by the Board: _____

On behalf of the Big Yellow Umbrella