

## **Confidentiality Policy**

### **Outreach EMR**

Members, trustees and volunteers who receive confidential or restricted information during the course of their dealings with Outreach EMR must not disclose to any unauthorised person any confidential information about the interests or business of the Charity, its trustees, members, donors or other partners. Such disclosures may lead to disciplinary action including, in serious cases, the termination of a post at the Charity or the removal of a trustee.

A non-exhaustive list of information which the Charity considers confidential (unless such information is already legitimately in the public domain) includes:

- any personal information about trustees, members, donors, patients or other partners (other than details published with the consent of the person concerned) such as their name and address, personal, financial or family circumstances
- information held in relation to funding applications, grant applications, joint ventures, project initiatives, strategic plans, etc. (other than those published by the charity for public consumption)
- financial information other than information already in the public domain
- details of any security arrangements including IT security e.g. passwords etc.
- individual reimbursements or other confidential information relating to members or trustees

When trustees, members or volunteers leave the Charity they must immediately return any files, documents, and other papers relating directly or indirectly to the charity or its beneficiaries, funders or other partners.

Trustees, members and volunteers must be particularly alert to requests from the press or other media and should refer such requests to the Chair before disclosing any information in response to such enquiries.

### **Restricted information within the Charity**

Restricted information includes confidential and sensitive information that is restricted to those members, trustees, donors or other partners who need or receive the information in the course of their work. Restricted information must not be disclosed to anyone else, whether inside or outside the charity. Restricted information, whether communicated orally,

### **Outreach EMR**

electronically or in writing, should always be identified as 'Confidential' and where appropriate 'For [recipient's] eyes only'. Such information might include:

- proposals or plans for the future
- special forthcoming projects, programmes, events or initiatives before they have been announced or publicised
- financial and statistical information
- sensitive business information
- sensitive personal information about existing or potential beneficiaries, trustees or volunteers

### **Patient Confidentiality**

Patient confidentiality is of paramount importance and is covered elsewhere in our Legal Agreement document.

### **General rules in support of confidentiality**

Everyone associated with the Charity is encouraged NOT to:

- give any press interviews or statements on or off the record, without first discussing with the Chair
- write personal communications under the Charity's logo
- engage in social media on behalf of the Charity without prior authorisation of nominated social media spokespeople or the Chair. Social media engagement is covered elsewhere in our Social Media Policy.

### **Notes**

1. Members, trustees and volunteers leaving the Charity will continue to be bound by their obligations of confidentiality even after the termination of their post at the Charity. Former members, trustees or volunteers may not make use of non-public information gained during their involvement with the Charity for their own benefit or for the benefit of any other person.
2. Nothing in this policy will prevent an individual from making a 'protected disclosure' within the meaning of the Public Interest Disclosure Act 1998; (i.e. a legitimate, good faith, 'whistleblowing' disclosure).
3. Breaches of this policy by trustees will be dealt with under the process laid down in the trustee code of conduct.

Policy Updated 26.04.'2026