



## **PECAN Confidentiality and Data Protection Policy for My Home Made Better Project**

### **1. Introduction**

Petersfield Climate Action Network (PeCAN) is committed to protecting the privacy, confidentiality and personal data of all individuals who engage with our services. This policy outlines how staff and volunteers must handle, store and process personal data and confidential information when providing energy advice to customers, ensuring compliance with relevant data protection laws.

### **2. Purpose**

This policy aims to ensure that all personal information shared by customers is processed lawfully, fairly and transparently, remains confidential and is used only for the purpose of delivering energy advice. It also ensures compliance with relevant data protection laws.

### **3. Scope**

This policy applies to all volunteers, staff, and any third parties involved in delivering energy advice on behalf of Petersfield Climate Action Network.

### **4. Definition of Confidential Information**

Confidential information includes, but is not limited to:

- Personal details of customers (name, address, contact information, etc.)
- Household financial information (for grant eligibility)
- Details of a customer's energy usage, needs, and vulnerabilities
- Any other sensitive information shared during consultations
- Any other information that can identify an individual

### **5. Collecting and Processing Confidential Information**

Staff and volunteers must only collect and record information that is necessary for providing energy advice.



Customers must be informed about how their data will be used and provide consent where required.

Information must be stored securely and only accessible to authorised individuals.

Any hand-written notes made while delivering advice must be shredded once the information has been uploaded via Jotform to the secure online systems.

Staff and volunteers must not share or discuss confidential information with unauthorised persons.

## **6. Data Protection and Storage**

Personal information must be stored securely, whether in digital or paper format.

Data should be retained only for as long as necessary and disposed of securely when no longer needed.

Any digital data should be protected with strong passwords and encryption where appropriate.

## **7. Breaches of Confidentiality**

Any suspected or actual breaches of confidentiality must be reported to the PeCAN Team Leader immediately.

Breaches will be investigated, and appropriate action will be taken, which may include retraining, disciplinary action, or referral to relevant authorities.

## **8. Exceptions to Confidentiality**

Confidentiality may be breached in exceptional circumstances, such as:

- Where there is a legal obligation to disclose information (e.g., safeguarding concerns, criminal activity, court orders).
- Where there is a risk of serious harm to the individual or others.
- In such cases, disclosures must be made to the appropriate authority following internal procedures.

## **9. Data Breaches and Reporting**



- Any suspected or actual data breaches must be reported immediately to the Staff Trustee.
- Investigations will be conducted, and appropriate measures will be taken to mitigate risks.

## **10. Data Subject Rights**

Customers have the right to:

- Access their personal data upon request
- Request corrections to inaccurate information
- Withdraw consent for data processing
- Request deletion of their data where applicable

## **11. Staff and Volunteer Responsibilities**

All staff and volunteers must:

- Read and understand this confidentiality policy before engaging with customers.
- Attend relevant training on confidentiality and data protection.
- Seek guidance if uncertain about data handling procedures and confidentiality issues.

## **12. Review and Updates**

This policy will be reviewed regularly to ensure it remains effective and compliant with legal requirements. Any updates will be communicated to volunteers and staff.

Policy approved: 7 May 2025