

PRIVACY POLICY–THE SALVATION ARMY BRITISH COLUMBIA DIVISION

The Salvation Army British Columbia Division affirms the importance of maintaining in confidence the personal information retained on our employees, volunteers, clients, residents, customers and donors. Our ministry units have always demonstrated extreme care in the handling of personal information, and we are committed to continuing this practice as required under the *British Columbia Personal Information Protection Act*. As such, the following formal policies and procedures, which articulate our current practices, will apply commencing January 1, 2004 in regard to the collection, use and disclosure of personal information within our operations:

1. Definitions

- 1.1 'Personal Information' shall be defined as any information about an identifiable individual (excluding business contact information), including, but not limited to, name, private address, private phone number, private e-mail address, emergency contact information, picture images, dependent information, Social Insurance Number, gender, age (Date of Birth), sexual orientation, marital status, race, nationality, ethnic origin, religious beliefs, political beliefs, health information, Care Card #, history of violence/aggression, temperament, personality assessments, education, financial information, employment history, criminal record, donation history, internet browsing logs.
- 1.2 'Individuals' for whom personal information may be retained will include the organization's Employees, Volunteers, Donors, Clients, Customers and Residents, plus their Family Members and/or Emergency Contacts, where applicable.

2. Duty to Inform

- 2.1 Personal Information on a Client/Resident/Customer/Congregant/Donor/Volunteer (and/or family member/emergency contact, where applicable) shall only be collected, used and disclosed with the knowledge and consent of the individual. The organization has the freedom to request personal information that is reasonable and appropriate to the situation and/or the actual service being provided.
- 2.2 Personal Information on an Employee (and/or family member/emergency contact, where applicable) which is reasonably required to establish, manage and/or terminate the employment relationship between the employee and the organization will be collected, used and disclosed with the employee's prior knowledge.
- 2.3 All clients/residents/customers/congregants/donors/volunteers (and/or family members/emergency contacts, where applicable) will be fully informed of the uses for the personal information being collected, at the time of collection. Consent will be implied where the individual, who has been so informed, voluntarily provides the personal information requested. In residential social service settings, individuals providing personal information will be asked to sign a statement indicating that they have been fully informed of the intended uses of the personal information.
- 2.4 Intake and Assessment Forms used by the organization's ministry units will reflect the provisions of this Privacy Policy.
- 2.5 Donation remittance forms for financial contributions will include a disclaimer allowing the donor to 'opt out' of having their Personal Information retained, used or disclosed by the organization. Where the 'opt out' provision is not utilized, consent will be implied.
- 2.6 Brochures outlining the organization's privacy policy and practices will be made available to any enquirer upon request.

3. Access to Personal Information
 - 3.1 Clients/Residents/Customers/Congregants/Donors/Volunteers will retain the right to view the personal information retained by the organization on their behalf, to request corrections of erroneous or out-dated information, and to withdraw consent for the collection, retention, use and disclosure of personal information.
 - 3.2 Where legal or contractual obligations require the long-term retention of client/resident records, consent for same cannot be withdrawn by the client/resident.
 - 3.3 Employees will retain the right to view the personal information retained by the organization on their behalf and to request corrections of erroneous or out-dated information.
 - 3.4 Written requests to view personal information, which detail the specific information sought, will be accepted during the ministry unit's regular business hours and actual viewing in the presence of a Salvation Army representative will be arranged on a regular business day, usually within 72 hours of the request or within the timeframes outlined in local policy and/or collective agreement (if applicable).
4. Accuracy of Personal Information
 - 4.1 The organization will take all reasonable steps to ensure that all personal information collected and used is accurate and up-to-date, especially where the information will impact on service delivery and/or ongoing employment and/or benefits.
5. Security
 - 5.1 Files and records (including back-up disks) containing personal information will be secured in locked cabinets and password protected electronic files only. Files and records will be retained for the periods identified in The Salvation Army's Official Minute on 'Retention of Records' or for the periods required by law, whichever is greater.
 - 5.2 Where required by funding contracts, Client/Resident records will be passed on to funding bodies, at the time identified under the contract, in a manner that ensures the security of the personal information.
 - 5.3 Where files containing personal information are transported away from the ministry unit, they will be secured in locked briefcases and/or cabinets.
6. Uses of Personal Information
 - 6.1 Personal Information on Clients/Residents will be restricted to information that is necessary to:
 - a. appropriately assess the client/resident's needs and suitability for assistance/service (initially and on an ongoing basis),
 - b. provide a service/ministry to the client/resident that reflects his/her needs (including referral services),
 - c. provide for the physical/emotional/spiritual care of the client/resident,
 - d. ensure effective case management on behalf of the client/resident,
 - e. officially document service/s provided to a client/resident,
 - f. provide information to the client/resident on services available for them,
 - g. protect staff members who are involved in service delivery to the client/resident,
 - h. take appropriate action on behalf of the client/resident in an emergency situation,
 - i. investigate complaints/grievances affecting the client/resident,
 - j. discipline the client/resident, as appropriate,
 - k. remove the client/resident from the ministry unit/program, as appropriate,

- l. provide the organization with demographic data on its client/resident base which will allow for effective long-term program planning and service delivery,
 - m. meet organizational responsibilities under funding contracts, where applicable,
 - n. provide or secure references on behalf of clients/residents,
 - o. record significant incidents and serious occurrences, as required by law, funding/insurance contracts and/or internal policy, and/or
 - p. to assist other service providers (governmental and community) in assessing needs and gathering critical statistics for future program planning.
- 6.2 Personal Information on Store Customers will be restricted to information that is necessary to:
- a. provide a service/ministry to the customer that reflects his/her needs,
 - b. provide for the physical/emotional/spiritual care of the customer, as appropriate,
 - c. provide information to the customer on services available for them (including mail-outs of special sales information),
 - d. protect staff members who are involved in service delivery to the customer,
 - e. take appropriate action on behalf of the customer in an emergency situation,
 - f. investigate complaints/grievances affecting the customer,
 - g. discipline the customer, as appropriate,
 - h. remove the customer from the store/program, as appropriate,
 - i. provide the organization with demographic data on its customer base which will allow for effective long-term program planning and service delivery, and/or
 - j. record significant incidents and serious occurrences as required by law, insurance contracts and/or internal policy.
- 6.3 Personal Information on Congregants will be restricted to information that is necessary to:
- a. provide for the physical/emotional/spiritual care of the Congregant,
 - b. update Corps (church) mailing lists,
 - c. maintain Soldiership and Adherency (membership) rolls, Seeker's Registers, etc.
 - d. record relevant information relating to marriages, dedications, funerals, etc.,
 - e. provide a specific service/ministry to the Congregant (i.e. marriage or family counseling, pre-marital counseling, etc.),
 - f. provide information on the programs/services/special events available to the Congregant,
 - g. seek input on strategic planning and visioning initiatives affecting the congregation,
 - h. provide charitable donation receipts to the Congregant,
 - i. investigate complaints/grievances affecting the Congregant,
 - j. discipline the Congregant, as appropriate,
 - k. restrict access to programs, as appropriate,
 - l. protect staff and fellow Congregants who will have regular contact with the Congregant,
 - m. provide the Corps (church) with demographic data on its congregants which will allow for effective long-term program planning and service delivery,
 - n. record significant incidents and serious occurrences as required by law, insurance contracts and/or internal policy, and/or
 - o. provide character references, at the request of the Congregant.
- 6.4 Personal Information on Employees will be restricted to information that is necessary to:
- a. ensure organizational efficiency and staffing needs are consistently met,
 - b. effectively recruit, transfer, promote and/or call-in the employee in accordance with Salvation Army policies and procedures, including special screening requirements,
 - c. provide the employee with adequate supervision, coaching, discipline and effective performance management,
 - d. effectively manage employee absences, including medical absences,
 - e. investigate complaints/grievances affecting the employee,
 - f. foster positive staff relations,

- g. appropriately recognize the employee for his/her service,
 - h. process payroll on behalf of an employee,
 - i. coordinate benefit and RRSP coverage for an employee,
 - j. take appropriate action on behalf of the employee in an emergency situation,
 - k. terminate the employment relationship,
 - l. meet the obligations of contracts established with wage subsidy funders and/or employment placement agencies,
 - m. secure and/or provide references for employees, and/or
 - n. to record significant incidents and serious occurrences as required by law, insurance contracts and/or internal policy.
- 6.5 Personal Information on Volunteers will be restricted to information that is necessary to:
- a. ensure organizational efficiency and staffing needs are consistently met,
 - b. effectively recruit and/or transfer the volunteer in accordance with Salvation Army policies and procedures, including special screening requirements,
 - c. provide adequate supervision, coaching, discipline and effective performance management,
 - d. effectively manage volunteer absences,
 - e. investigate complaints/grievances affecting the volunteer,
 - f. foster positive volunteer relations,
 - g. ensure necessary liability insurance coverage is in effect for the volunteer, where applicable,
 - h. appropriately recognize the volunteer for his/her service,
 - i. take appropriate action on behalf of the volunteer in an emergency situation,
 - j. secure and/or provide references for the volunteer,
 - k. terminate the volunteer relationship,
 - l. meet organizational obligations under contracts established with place agencies, where applicable, and/or
 - m. record significant incidents and serious occurrences as required by law, placement/insurance contracts and/or internal policy.
- 6.6 Personal Information on Donors (individuals and organizations) will be restricted to information that is necessary to:
- a. establish/initiate and foster positive relations with donors,
 - b. track an individual donor's donation history with The Salvation Army,
 - c. manage the donor/prospects data-base,
 - d. arrange for pick-up of donations, at the donor's request,
 - e. provide charitable donation receipts to the donor,
 - f. provide financial planning advice to the donor, in the case of planned giving donations,
 - g. make ongoing requests for donations via mail/phone/etc.,
 - h. communicate with families regarding "in memorium" donations,
 - i. record and recognize the individual/organization who referred the donor, and/or
 - i. identify the specific interests of the donor/prospect, as well as his/her general donation history, in order to link the donor/prospect to specific project needs within the organization.
- 6.7 Personal Information on Family Members and/or Emergency Contacts will be restricted to information that is necessary to:
- a. update them on their family member's progress, where applicable,
 - b. solicit assistance/support in providing a service to their family member or in removing the family member from the program/ministry unit,
 - c. honor and recognize them, as appropriate,
 - d. make contact in the case of emergency situations involving their family members, and/or
 - e. provide insurance coverage and process claims under Employees' Group Insurance Program, where applicable.

- 6.8 In any situation where Personal Information will be used in new ways, beyond those outlined at the time the Personal Information was collected, the individual will be advised of the new use and the individual's implied or expressed consent will be secured prior to implementation of the new use. Consent will not be required in the case of Employee Personal Information being used in new ways.

7. Internal Disclosures

- 7.1 Personal Information on Clients/Residents/Customers/Congregants/Employees/Volunteers will be disclosed internally, on a 'need to know' basis only, to:
- a. those who serve in senior management/leadership or direct supervisory positions at the ministry unit,
 - b. staff who have direct responsibility for the management of files/records,
 - c. staff (employees, volunteers) who are responsible for service delivery,
 - d. staff, generally, where there is a history of aggression/violence, and
 - e. Salvation Army personnel at the Divisional Headquarters or Territorial Headquarters level, for the purpose of investigating complaints or for formal internal Accreditation and/or Audit purposes.
- 7.2 Personal Information on Donors will be disclosed internally, on a 'need to know' basis only, to:
- a. those who serve in senior management/leadership positions within the organization,
 - b. staff who serve in development (fundraising) positions within the organization,
 - c. front-line staff providing a specific service to the donor (ie. driver),
 - d. front-line staff who are responsible for donor data-base management, and/or
 - e. Salvation Army personnel at the divisional and territorial level who are responsible for formal project approval processes, where the donation is key to the approval of a project.
- 7.3 Staff who have access to confidential personal information will be required to sign and abide by a Confidentiality Statement.
- 7.4 All staff (employees and volunteers) will be fully oriented to the requirements of this Privacy Policy.

8. External Disclosures

- 8.1 Personal Information on Clients/Residents/Customers/Congregants/Employees/Volunteers will be disclosed externally, on a 'need to know basis' only:
- a. where required by law,
 - b. where required under funding, insurance and/or placement contracts,
 - c. to contractors who provide direct service delivery on behalf of the organization,
 - d. where required for external Accreditation and/or Audit purposes,
 - e. to governmental and community service providers offering similar services for clients,
 - f. to volunteer members of the organization's Community Councils, and
 - g. with the express written consent of the individual, for the purpose of advertising our programs and services.
- 8.2 In addition to the disclosures identified at 8.1 above, Personal Information on Employees will be disclosed externally, on a 'need to know basis' only:
- a. where required for benefits, RRSP and payroll processing, and
 - b. to Union Officials (where applicable) and/or Lawyers in situations of collective bargaining, grievance/arbitration, employee discipline or termination.

- 8.3 Personal Information on Donors may be disclosed externally to volunteers and contractors who directly assist the organization with ongoing fundraising projects and campaigns (including those responsible for processing of donations, maintaining the donor data-base and processing direct-mail appeals.) Personal Information on Donors may also be disclosed externally, for the purpose of advertising our programs and services, but only with the Donor's express written consent.
- 8.4 Contracts with independent service providers who: a) provide services on behalf of the organization, or b) assist the organization with fundraising projects and campaigns; and who, therefore, have access to Personal Information on individuals, will expressly delineate the need for strict confidentiality. Further, the contracts will clearly express the requirement that Personal Information on individuals associated with the organization will only be collected, used and disclosed by the Contractor with the organization's and the individual's full knowledge and, where applicable, consent. Contractors will be required to apply privacy policy standards consistent with *PIPA* and The Salvation Army's privacy policy in its service delivery for the organization.
- 8.5 In any situation where Personal Information will be disclosed in new ways, beyond those outlined at the time the Personal Information was collected, the individual will be advised of the new disclosure practice and the individual's implied or expressed consent will be secured prior to implementation of the new disclosure practice. Consent will not be required in the case of Employee Personal Information being disclosed in new ways.

9. Oversight

- 9.1 Officers and Lay Managers at the individual ministry unit will be responsible for ensuring ongoing compliance with this Privacy Policy within their services/programs.
- 9.2 Privacy Officers will be appointed by the organization and will be responsible for:
- taking appropriate steps to ensure Officers/Lay Managers meet their responsibilities in ensuring ongoing compliance with this policy and the *British Columbia Personal Information Protection Act (PIPA)*,
 - maintaining the Privacy Policy Brochures (outlined in Clause 2.6) and ensuring that ministry units have an adequate supply at all times,
 - receiving and investigating any internal complaints regarding the collection, use or disclosure of personal information,
 - providing ongoing advice and guidance to supervisors/managers on privacy issues and legislation,
 - ensuring that training is available to managers and staff, who routinely access Personal Information as part of their job responsibilities,
 - ensuring that an audit of privacy practices is conducted at least tri-annually within the Division,
 - assisting the Provincial Information and Privacy Commissioner in the investigation of any external complaints regarding the collection, use or disclosure of personal information within the organization.
- 9.3 The names of the organization's Privacy Officers will be published at all ministry units, and contact information for the Privacy Officers will be provided upon request to any enquirer.

10. Internal Complaint Procedure

- 10.1 Where an individual has concerns regarding the collection, use, retention or disclosure of their personal information by the organization, a complaint should be lodged with the Executive Director or Corps Officer at the ministry unit. Such complaint will be investigated and responded to within 30 days of receipt.

- 10.2 Where the complaint is not satisfactorily resolved at the ministry unit level, a formal written complaint may be lodged with the appropriate internal Privacy Officer. A confidential, formal investigation will be conducted by the Privacy Officer (or his/her designate) within three weeks of receipt of the complaint, and where the complaint is justified, the Privacy Officer will outline appropriate measures to be taken to rectify the situation. The outcome of the investigation, including a summation of action taken (where applicable), will be provided to the complainant in writing.

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