

CONFIDENTIALITY PROTOCOL

Date: 15 May 2017 (Reviewed February 2024)

Purpose

This protocol details the approach of the Trustees of Halton Lune Trust to the handling of confidential information held in respect of grant applications. The protocol applies to all trustees. It will be reviewed annually to ensure that it remains effective and relevant.

Importance of Confidentiality

The Trust is responsible for the administration of grants for public benefit within and around the Parish of Halton with Aughton, in line with the objectives of the Halton Lune Trust and under Charity commission rules. Grant applications may contain confidential financial information, and meetings held to discuss individual applications are considered confidential.

The Trustees will:

- Not discuss or disclose confidential information with any third party outside of the Trust unless the express consent of the trust has been obtained
- Handle information received from another provider sensitively and confidentially;
- Ensure that confidential information is stored securely

Grant Distribution

The Trust will make public the details of the grants distributed and the nature of the applications received.