

This form has been designed to meet the needs of a diverse range of organizations. To make the form reflect the operations of your particular organizations, fill in the appropriate information in all areas highlighted in yellow

## Name of organization

### Personal Information Protection Policy

At **Name of organization**, we are committed to providing our **clients, customers, members** with exceptional service. As providing this service involves the collection, use and disclosure of some personal information about our **clients, customers, members**, protecting their personal information is one of our highest priorities.

While we have always respected our **clients, customers, members** privacy and safeguarded their personal information, we have strengthened our commitment to protecting personal information as a result of British Columbia's *Personal Information Protection Act* (PIPA). PIPA, which came into effect on January 1, 2004, sets out the ground rules for how B.C. businesses and not-for-profit organizations may collect, use and disclose personal information.

We will inform our **clients, customers, members** of why and how we collect, use and disclose their personal information, obtain their consent where required, and only handle their personal information in a manner that a reasonable person would consider appropriate in the circumstances.

This Personal Information Protection Policy, in compliance with PIPA, outlines the principles and practices we will follow in protecting **clients', customers', members'** personal information. Our privacy commitment includes ensuring the accuracy, confidentiality, and security of our **clients', customers', members'** personal information and allowing our **clients, customers, members** to request access to, and correction of, their personal information.

#### Scope of this Policy **[OPTIONAL SECTION: The Scope section should only be included if applicable]**

This Personal Information Protection Policy applies to **Name of organization** and its subsidiaries, **Names of subsidiaries**.

This policy also applies to any service providers collecting, using or disclosing personal information on behalf of **Name of organization**.

#### Definitions

**Personal Information** –means information about an identifiable *individual* **[OPTIONAL ADDITION: consider**

providing examples of personal information your organization collects. E.g., including name, age, home address and phone number, social insurance number, marital status, religion, income, credit history, medical information, education, employment information]. Personal information does not include contact information (described below).

**Contact information** – means information that would enable an individual to be contacted at a place of business and includes name, position name or title, business telephone number, business address, business email or business fax number. Contact information is not covered by this policy or PIPA.

**Privacy Officer** – means the individual designated responsibility for ensuring that **Name of organization** complies with this policy and PIPA.

## Policy 1 – Collecting Personal Information

- 1.1 Unless the purposes for collecting personal information are obvious and the **client, customer, member** voluntarily provides his or her personal information for those purposes, we will communicate the purposes for which personal information is being collected, either orally or in writing, before or at the time of collection.
- 1.2 We will only collect **client, customer, member** information that is necessary to fulfill the following purposes:

*[Fill in the purposes for which your organization collects personal information. Examples of purpose statements, which may or may not be applicable to your organization, include:*

- To verify identity;
- To verify creditworthiness;
- To identify [client, customer, member] preferences;
- To understand the [financial, banking, insurance] needs of our [clients, customers, members];
- To open and manage an account;
- To deliver requested products and services
- To guarantee a travel or hotel reservation;
- To process a magazine subscription;
- To provide [medical, dental, counselling] services;
- To enrol the client in a program;
- To send out association membership information;
- To contact our [clients, customers, members] for fundraising;
- To ensure a high standard of service to our [clients, customers, members];
- To meet regulatory requirements;
- To assess suitability for tenancy;
- To collect and process rent payments;

**[OPTIONAL ADDITION:** Consider including after each applicable purpose statement the personal information you collect to fulfill that purpose. For example: To verify identity, we may collect name, home address, home telephone number and birth date;]

## Policy 2 – Consent

- 2.1 We will obtain **client, customer, member** consent to collect, use or disclose personal information (except where, as noted below, we are authorized to do so without consent).
- 2.2 Consent can be provided [*include the methods that apply to your organization: e.g., orally, in writing, electronically, through an authorized representative*] or it can be implied where the purpose for collecting using or disclosing the personal information would be considered obvious and the **client, customer, member** voluntarily provides personal information for that purpose.
- 2.3 Consent may also be implied where a **client, customer, member** is given notice and a reasonable opportunity to opt-out of his or her personal information being used for **mail-outs, the marketing of new services or products, fundraising** and the **client, customer, member** does not opt-out.
- 2.4 Subject to certain exceptions (e.g., the personal information is necessary to provide the service or product, or the withdrawal of consent would frustrate the performance of a legal obligation), **clients, customers, members** can withhold or withdraw their consent for **Name of organization** to use their personal information in certain ways. A **client's, customer's, member's** decision to withhold or withdraw their consent to certain uses of personal information may restrict our ability to provide a particular service or product. If so, we will explain the situation to assist the **client, customer, member** in making the decision.
- 2.5 We may collect, use or disclose personal information without the **client's, customer's, member's** knowledge or consent in the following limited circumstances:

*[Fill in the situations that may be applicable to your organization. A full listing of such circumstances can be found in sections 12, 15, and 18 of PIPA. Some examples include:]*

- When the collection, use or disclosure of personal information is permitted or required by law;
- In an emergency that threatens an individual's life, health, or personal security;
- When the personal information is available from a public source (e.g., a telephone directory);
- When we require legal advice from a lawyer;
- For the purposes of collecting a debt;
- To protect ourselves from fraud;
- To investigate an anticipated breach of an agreement or a contravention of law

## Policy 3 – Using and Disclosing Personal Information

- 3.1 We will only use or disclose **client, customer, member** personal information where necessary to fulfill the purposes identified at the time of collection [*or for a purpose reasonably related to those purposes such as:*  
*Fill in any related purposes for which your organization uses or discloses personal information.*  
*Examples that may be applicable to your organization, include:*
  - To conduct client, customer, member surveys in order to enhance the provision of our services;
  - To contact our [**clients, customers, members**] directly about products and services that may be of **interest;**]
- 3.2 We will not use or disclose **client, customer, member** personal information for any additional purpose unless we obtain consent to do so.
- 3.3 We will not sell **client, customer, member** lists or personal information to other parties [*unless we have consent to do so*].

## Policy 4 – Retaining Personal Information

- 4.1 If we use **client, customer, member** personal information to make a decision that directly affects the **client, customer, member**, we will retain that personal information for at least one year so that the **client, customer, member** has a reasonable opportunity to request access to it.
- 4.2 Subject to policy 4.1, we will retain **client, customer, member** personal information only as long as necessary to fulfill the identified purposes or a legal or business purpose.

## Policy 5 – Ensuring Accuracy of Personal Information

- 5.1 We will make reasonable efforts to ensure that **client, customer, member** personal information is accurate and complete where it may be used to make a decision about the **client, customer, member** or disclosed to another organization.
- 5.2 **Clients, Customers, Members** may request correction to their personal information in order to ensure its accuracy and completeness. A request to correct personal information must be made in writing and provide sufficient detail to identify the personal information and the correction being sought.  
**[IF APPLICABLE: A request to correct personal information should be forwarded to the Privacy Officer [or designated individual].**
- 5.3 If the personal information is demonstrated to be inaccurate or incomplete, we will correct the information as required and send the corrected information to any organization to which we disclosed the personal information in the previous year. If the correction is not made, we will note the **clients', customers', members'** correction request in the file.

## Policy 6 – Securing Personal Information

- 6.1 We are committed to ensuring the security of **client, customer, member** personal information in order to protect it from unauthorized access, collection, use, disclosure, copying, modification or disposal or similar risks.
- 6.2 The following security measures will be followed to ensure that **client, customer, member** personal information is appropriately protected:  
**[Fill in security measures that apply to your organization. Examples may include: the use of locked filing cabinets; physically securing offices where personal information is held; the use of user IDs, passwords, encryption, firewalls; restricting employee access to personal information as appropriate (i.e., only those that need to know will have access; contractually requiring any service providers to provide comparable security measures)].**
- 6.3 We will use appropriate security measures when destroying **client's, customer's, member's** personal information such as **[Fill in destruction methods your organization employs. Examples may include: shredding documents, deleting electronically stored information].**
- 6.4 We will continually review and update our security policies and controls as technology changes to ensure ongoing personal information security.

## Policy 7 – Providing **Clients, Customers, Members** Access to Personal Information

- 7.1 **Clients, Customers, Members** have a right to access their personal information, subject to limited exceptions.  
**[OPTIONAL ADDITION: Fill in exceptions to access that might apply. A full listing of the exceptions to access can be found in section 23 of PIPA. Some examples include: solicitor-client privilege, disclosure would reveal personal information about another individual, health and safety concerns]**
- 7.2 A request to access personal information must be made in writing and provide sufficient detail to identify the personal information being sought. **[IF APPLICABLE: A request to access personal information should be forwarded to the Privacy Officer [or designated individual]**

- 7.3 Upon request, we will also tell **clients, customers, members** how we use their personal information and to whom it has been disclosed if applicable.
- 7.4 We will make the requested information available within 30 business days, or provide written notice of an extension where additional time is required to fulfill the request.
- 7.5 A minimal fee may be charged for providing access to personal information. Where a fee may apply, we will inform the **client, customer, member** of the cost and request further direction from the **client, customer, member** on whether or not we should proceed with the request.
- 7.6 If a request is refused in full or in part, we will notify the **client, customer, member** in writing, providing the reasons for refusal and the recourse available to the **client, customer, member**.

## **Policy 8 – Questions and Complaints: The Role of the Privacy Officer or designated individual**

- 8.1 The Privacy Officer **or designated individual** is responsible for ensuring **Name of organization's** compliance with this policy and the *Personal Information Protection Act*.
- 8.2 **Clients, Customers, Members** should direct any complaints, concerns or questions regarding **Name of organization's** compliance in writing to the Privacy Officer. If the Privacy Officer is unable to resolve the concern, the **client, customer, member** may also write to the Information and Privacy Commissioner of British Columbia.

Contact information for **Name of organization's** Privacy Officer **or designated individual**:

**Insert Contact Information**