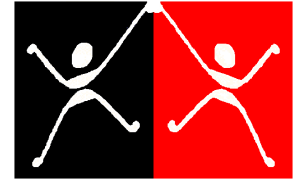


# The SMART Career and Life Coaching Trust

Work SMART, Play SMART, Live SMART

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## Privacy Policy

*Effective Date: 8<sup>th</sup> March 2010*

We respect the privacy of our coachees and the importance of the information that is entrusted to us. This privacy policy informs coachees of the following:

- what information is being collected on them,
- how that information is being used,
- with whom it is being shared,
- security precautions to protect information, and
- coachee access to private information

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## What Information Is Collected

New coachees of the SMART Career and Life Coaching Trust are required to complete a Coaching Introduction Form that records general coachee details such as name, address and contact phone numbers. It also captures information relating to any prior coaching or therapeutic history that might be relevant to the current request for coaching. The remainder of the form collects details relating to the coachee's expectations of what issues and coaching styles will be needed during this coaching relationship.

The coaching sessions will collect information or detail relating to the specific issue(s) to be addressed along with personal thoughts, feelings and beliefs surrounding the issue. Goals that aim to address the issue will be recorded along with action plans and monitored progress against those plans.

## How Is Information Used

The information collected by The SMART Career and Life Coaching Trust is used to:

- determine how coaching sessions are to be delivered (i.e. coaching approach),
- develop and maintain a coaching relationship with the coachee,
- find resolution, establish goals and action plans that aim to improve the coachee's current situation, and to
- monitor the coachee's performance against the set plans.

The internal operations of the SMART Career and Life Coaching Trust will require from time-to-time the use of collected information (e.g. testimonials, coachee identification details such as name and email address) for the

purposes of internal training and service quality improvement or for external promotion of those services provided by the Trust. Prior to the use of this personal information, the SMART Career and Life Coaching Trust will request permission and obtain written authorisation from the coachee.

### **With Whom Information Is Shared**

During a coaching relationship it may be identified that a specialist in an area of expertise outside of coaching (e.g. a therapeutic practitioner) will be required by the coachee to enable action going forward. This referral would be discussed with the coachee first. Upon their agreement information identifying the coachee (i.e. name and contact details) as well as a factual description of the situation will be disclosed to the specialist for the purpose of providing referee notification and for logistical arrangements. Permission to disclose will be requested and written authorisation will be obtained from the coachee prior to any such disclosure.

For the purpose of internal training and service quality improvement, personal information identifying the coachee may be provided to professional coaching associations committed to the continuing professional development and certification of their coaches. Permission to disclose will be requested and written authorisation will be obtained from the coachee prior to any such disclosure.

For the purpose of promoting the services offered by the SMART Career and Life Coaching Trust, personal information identifying the coachee (i.e. full name/business name) and testimonial comments relating to the quality of provided services will be published for the general public in printed promotional material and/or via the company website. Permission to disclose will be requested and written authorisation will be obtained from the coachee prior to any such disclosure.

We may disclose any information you voluntarily provide to us in order to comply with court orders, subpoenas or regulatory obligations, or when otherwise required to do so by law.

We also may disclose such information in compliance with a law-enforcement or other governmental request, or where we believe disclosure is necessary to investigate, prevent or take action regarding illegal activities, suspected fraud and situations involving potential threats to the physical safety of any person or violations of our Coaching Agreement and/or the Terms and Conditions.

### **Security Precautions to Protect Information**

We have security measures in place that are designed to safeguard and help prevent unauthorised access to information we collect from you. Both industry and proprietary standards are utilised to preserve the confidentiality of information.

Access to coachee information is limited to the coach who needs access to that information to provide our services to you. The coaches are committed to a Code of Conduct that requires them to maintain the security and confidentiality of such information.

Unfortunately no security system can be 100% secure. Accordingly, we cannot guarantee 100% the security of the information that we collect from you.

**Coachee Access to Private Information**

At anytime the coachee may request in writing to see the personal information that has been collected on them and upon review, make written requests to add/amend/delete details as required.

Any questions regarding this Privacy Policy should be directed to the SMART Career and Life Coaching Trust.