PARTICIPANT PRIVACY & CONSENT FORM

Family Compass: Guiding Care and Connection

Partners for Planning (P4P) values your trust and is committed to protecting your personal privacy. This form explains why we collect your information, how we protect it, who can access it, and your rights regarding your data under Ontario and Canadian privacy laws.

1. Why We Collect Your Information

When you sign up for one-to-one facilitation or workshop sessions, we collect details about you and your family to:

- **Provide Personalized Support**: Match you with support personnel and tailor our meetings to the specific topics you want to work on.
- **Stay in Touch:** Communicate with you about meeting schedules, resources, and session updates.
- **Measure Program Impact:** Understand how our program is helping families so we can continuously improve our work and report overall, anonymous progress results to our project funder, Petro-Canada Caremakers Foundation. *(Note: Full names and any identifying details are never included in reports).*

2. What Personal Information We Collect

We only collect information that is strictly necessary to support you, including:

- Your name, contact details (email, phone, general location), and preferred method of contact.
- Information about your current situation, main goals, and selected planning topics.
- Brief notes recorded by your facilitator to track the next steps you choose to take together.
- When voluntarily shared and directly applicable: fundamental details concerning your financial circumstances, healthcare requirements, support needs, or medical diagnoses that pertain to your requested planning areas.

3. How We Share and Protect Your Data

- **Limited Sharing:** Your personal information is only accessible to designated Partners for Planning staff and the facilitator directly assigned to work with you. We do not sell, rent, or share your personal details with third-party service providers or external agencies without your explicit written permission.
- **Secure Storage:** We maintain all digital intake information and facilitator notes within Civictrack, our encrypted database platform. Any manual records are promptly transcribed into this secure system and then destroyed.
- **Potential Risks:** While we maintain strict organizational and electronic safeguards to prevent unauthorized access, no electronic system is 100% risk-free. In the event of a security issue that puts your information at risk, we will inform you promptly.

4. Retention and Accuracy

We keep your information only as long as necessary to provide facilitation services and meet legal or administrative requirements. Afterwards, files are securely destroyed or anonymized. You can ask us to update, correct, or delete your information at any time.

5. Your Choices & Privacy Rights

You have full control over your personal information:

- **Accessing Your File:** You have the right to request a copy of the personal information we hold about you.
- **Withdrawing Consent:** You can withdraw your consent for us to collect, use, or store your personal information at any time, subject to reasonable notice. If you withdraw consent, we may no longer be able to provide direct support to you.
- **Questions or Privacy Complaints:** If you have questions about your privacy, wish to update your records, or have concerns about how your data is handled, please contact our Executive Director.

Executive Director: Jill Teeple

Email: jteeple@p4p.ca

Full Terms and Conditions: You can review Partners for Planning's Terms and Conditions online at https://planningnetwork.ca/terms.

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