

## INFORMATION MANAGEMENT STATEMENT

### Our Commitment to Effective Information Management

At Blue Circle Surveyors Ltd, we recognise that effective information management is crucial to our success. Our approach ensures compliance with legal and regulatory requirements, enhances operational effectiveness, and supports informed decision-making. We are committed to maintaining data integrity, security, and accessibility while promoting transparency and accountability in all our operations.

This statement outlines our structured approach to managing information securely and efficiently, ensuring compliance with the UK Information Management Framework, BS EN ISO 19650-1, and BS EN ISO 19650-2.

### Our Information Management Policy

This policy applies to all employees, contractors, consultants, and third parties who access, create, handle, or manage information on behalf of Blue Circle Surveyors Ltd. It covers all forms of information, including digital records, paper documents, survey data, and confidential business knowledge.

Our commitments include:

- **Ensuring accurate and consistent information capture** across digital and physical formats.
- **Implementing best practices** for controlled access, retention, and disposal of records.
- **Safeguarding sensitive and confidential data** while promoting knowledge sharing.
- **Complying with industry regulations, data protection laws, and corporate governance standards.**

### Information Storage & Security

We ensure structured and secure data management by:

- Implementing a **Common Data Environment (CDE)** for collaborative data exchange and document control.
- Storing records using **appropriate digital software systems**, and **secure physical storage**.
- Enforcing **strict access control measures** to protect sensitive information.
- Aligning with **Cyber Essentials Accreditation** to uphold cybersecurity standards.

### Controlled Access & Governance

To maintain data security, we:

- Use **Role-Based Access Control (RBAC)** to limit data access based on job responsibilities.
- Enforce **Multi-Factor Authentication (MFA)** for accessing critical systems.
- Conduct **regular audits and security reviews** to detect and mitigate risks.

### Retention & Disposal of Information

We adhere to strict data retention policies, ensuring compliance with:

- **ISO 19650-2** for document management and project records.



- **CDM Regulations 2015** for health and safety documentation.
- **GDPR & Data Protection Act 2018** for personal and client data.
- Defined retention periods, ranging from **6 years for financial records** to **30 years for structural reports** under the Defective Premises Act.

### Releasing & Sharing Information

To ensure secure and controlled information release, we:

- Implement **formal request procedures** for accessing data.
- Categorise information under **confidentiality levels** and enforce encryption.
- Require **confidentiality agreements (NDAs)** before sharing sensitive data.
- Maintain **audit trails** to track all information disclosures.

### Training & Compliance

We provide regular training on information security, GDPR compliance, and cyber risk management to ensure all employees understand their responsibilities in handling sensitive data.

### Monitoring and Review

The company's directors will review compliance with this statement annually to ensure ongoing alignment with industry best practices and regulatory requirements.

This statement does not form part of any employee's contract of employment or any contract with third parties and may be amended at any time.

### Approved by:



Nick Medlock  
Director – Blue Circle Surveyors Ltd  
Date: 10/03/2025