

With effect from _____

Date / /

The Representative of the Relief Chest named below

Chest Number

Shall be changed from **OUTGOING** representative below:

First Name

Surname

Approved by the Secretary (or equivalent):

Name (in capitals)

Signature

Date / /

to **NEW** Representative detailed below: _____

First Name

Surname

Address (House number/name)

Postcode Telephone

Email

DECLARATION to be completed by the NEW representative _____

I confirm that I have read and understood the Relief Chest Scheme Privacy Policy and agree to comply and abide by the Terms and Conditions.

I confirm I have read and understood the Relief Chest Scheme "Operating Manual and Rules".

Relief Chest Representative:

Name (in capitals)

Signature

Date / /

Send this completed form to:

Relief Chest Scheme, Masonic Charitable Foundation, 60 Great Queen Street, London WC2B 5AZ

Tel: 020 3146 3352 Email: reliefchest@mcf.org.uk

Data Protection Act 2018 and the UK GDPR (General Data Protection Regulation) - Privacy Notice

The Relief Chest Scheme is committed to protecting your personal information. The scheme is fully compliant with DPA and UK GDPR legislation when handling your personal data. Our legal basis for collecting, processing and sharing personal information as set out in our Privacy Policy is based on the legitimate interest of the Relief Chest Scheme.

To find out more about how we handle, share and store your personal information and how to amend or request a copy of any personal information we hold about you, please visit <https://mcf.org.uk/policies/privacy/relief-chest-privacy-policy/>





RELIEF CHEST SCHEME

STATEMENT OF RESPONSIBILITIES FOR RELIEF CHEST REPRESENTATIVES

This policy is effective from 25 May 2018

INTRODUCTION

This statement of responsibilities sets out how the Relief Chest Scheme expect the Relief Chest Representatives to use and protect personal and other information provided.

The Relief Chest Scheme is committed to ensuring the privacy and confidentiality of personal information provided to us. Any personal information provided to you as the Relief Chest Representative by the Relief Chest office to help you administer your Relief Chest must be treated as private and confidential. This document governs the use of information provided to you as the Relief Chest Representative in any format including paper or electronic format.

ACCEPTANCE

By completing and returning either of the forms:

1. Relief Chest Application
2. Change of Representative
3. Access to Relief Chest Online
4. Relief Chest Online reporting

you agree and accept the terms and conditions set out in this document.

PERSONAL INFORMATION

The Relief Chest Scheme's Privacy Policy sets out how we treat personal and other information we collect. To obtain a copy contact the Relief Chest Scheme office or visit <https://mcf.org.uk/policies/privacy/relief-chest-privacy-policy/>

ACCESS SECURITY AND CONFIDENTIALITY

You must:

- Always treat any personal or any other information provided to you by us as confidential
- Use personal information only for assigned tasks, such as for preparing accounts, allocating and issuing honorifics, medals and certificates for a Provincial Festival or an Appeal
- Protect the security and integrity of personal or any other information provided to you
- Establish suitable procedures to safeguard your files containing personal information

- Do not sell, or pass on personal or any other information received from the Relief Chest Scheme in any format
- Do not reproduce duplicate, copy or otherwise exploit personal or any other information for commercial purposes
- Inform the Relief Chest Scheme immediately if you are no longer the Relief Chest Representative as you no longer have the right to such information

ONLINE SERVICES

For the Relief Chest Representatives who have been provided with online access to

- Relief Chest online service - APEX
- Reporting suite - IMPACT

The Relief Chest Scheme reserves the right to allow or restrict access by the Relief Chest Representatives to Relief Chest Online (APEX) or to the online Reporting system (IMPACT).

You must:

- Not disclose your password to any other person. If you believe your log in details have been used without your permission, you must notify immediately the Relief Chest Scheme
- Establish suitable electronic procedures to safeguard your computer and storage of personal and other information

HANDLING PERSONAL INFORMATION

According to the data protection rules, anyone handling personal information must ensure that stringent measures are in place to protect personal information.

If you have been granted access to our new reporting tool (IMPACT) you will be responsible for downloading, segmenting, Interrogating and analysing of personal information to prepare festival performance reports.

The Relief Chest Scheme's Privacy Policy specifies how the Relief Chest Scheme treat personal and other information collected. This Statement of Responsibilities document must be referred to in conjunction with the Relief Chest Scheme's Privacy Policy statement as guidance on how the Relief Chest Scheme manages personal and other collected information.

To obtain a copy of the Relief Chest Scheme Privacy Policy visit <https://mcf.org.uk/policies/privacy/relief-chest-privacy-policy/> or contact us

Telephone : 020 3146 3352

Email : reliefchest@mcf.org.uk

Address : Relief Chest Scheme, Masonic Charitable Foundation, 60 Great Queen Street, London WC2B 5AZ

This Statement of Responsibilities was reviewed and updated on 21 March 2023 and will be reviewed 21 March 2024.



Relief Chest Scheme Privacy Notice

Introduction

Masonic Charitable Foundation, Freemasons' Hall, 60 Great Queen Street, London, WC2B 5AZ is a Data Controller and in the execution of our legitimate business interests we may hold and process personal information about you or from which we can identify you.

This Privacy Notice describes how we deal with any personal information that you give to us or any that we may hold about you. Our Data Protection Lead can be contacted at any time, including if you have questions about this Privacy Notice, or wish to exercise any rights contained in it.

The Relief Chest Scheme is committed to ensuring the privacy of personal information we collect from our donors and Relief Chest representatives.

This Privacy Notice sets out how the Relief Chest Scheme protects personal and other information provided in paper and electronic formats.

Purpose for processing personal information

Our legal basis for collecting, processing and sharing personal information as described below is based on the legitimate interest of the Relief Chest Scheme. To provide you with the services and information you request and for administration and processing purposes, including donations, gift aid tax reclaim, honorifics/patronage, statutory and compliance monitoring.

The Relief Chest Scheme operates within the Masonic Charitable Foundation, which acts as the Data Controller for these purposes.

What information we collect from you

We may collect the following information

- Your full name
- Your full address including post code
- Your contact details such as an email address or a telephone number
- Your bank account details including a branch address
- Your Lodge, Chapter or any other Masonic organisation membership details
- Your tax payer status and Gift Aid preference

How we may collect your personal information

- Phone (setting up a paperless Direct Debit by phone or making a credit/debit card donation)
- Post (paper donation forms)

- Online (paperless Direct Debits, single donations or when sponsoring a fundraiser)
- Information forwarded by third parties

Why we need to collect your personal information and how it is used by the Relief Chest Scheme

- To identify you as a donor to process your donation into a Relief Chest
- To set up a Direct Debit instruction with your bank if you elect to donate regularly
- To submit a gift aid tax reclaim to HMRC, if you choose to gift aid your donation
- To identify you as the Relief Chest representative, if you have been elected for the role
- To send you Relief Chest communications relating to your role as the representative, such as receipts, thank you letters, statements and other correspondence in accordance with the Relief Chest Operating Procedure
- To update, where applicable, the Honorific Evaluation system (HONE) of the MCF. The HONE system uses personal information from donors who have made donations specifically to the MCF, by donating to the MCF general fund or donating to the MCF as part of a Provincial Festival in support of the MCF, to administer the MCF permanent honorifics programme and to inform a donor of any MCF honorific qualifying level reached as a result of any donation(s).

Sharing your personal information

The Relief Chest Scheme will not sell, share or distribute your personal information to any third party for marketing or other purposes. We will not use or share your personal information except for the purposes specified below to process a donation or to identify you as a Relief Chest representative.

We may share your personal information with:

- **United Grand Lodge Of England**
 - To identify you as a member of a Lodge, Chapter or other Masonic organisation, e.g. Rose Croix, Mark Master Masons
 - To allocate donations to the correct Lodge or Chapter for honorific purposes in connection with a Festival/Appeal
 - To identify you as a donor
- **Your bank**
 - To lodge a Direct Debit Instruction to facilitate regular donations into a Relief Chest
 - To request regular payments (monthly, quarterly, annually)

- To make amendments to the Direct Debit instruction (change bank account details, cancel the Direct Debit)
- **HMRC**
 - To submit a Gift Aid tax reclaim for Gift Aided donations (where eligible)
 - To refund any tax (where Gift Aid is reclaimed in error/not eligible)
- **Relief Chest Holder (Relief Chest Representative/s)**
 - We may share your personal information with the chest holder i.e. Relief Chest representative/s, to issue acknowledgments, receipts, subscribers lists or regular statements according to the Relief Chest Operating Procedure
 - Your personal information will be shared with the Relief Chest holder and its representatives for honorific purposes

The Relief Chest Scheme may share your details with third parties including:

- **Other registered charities**
 - When making donations from a Relief Chest to a registered charity, the Relief Chest representative's personal details (name, address and relief chest details) are forwarded to issue a receipt/thank you letter

The Relief Chest Scheme may use third party processing systems to check personal information you provide with:

- **Bottomline technologies**
 - When setting up a paperless Direct Debit (online or by phone) to verify bank details, ownership of the account and your address
- **Givetap.co.uk**

Digital Donations service provider

- To send two pre-approved emails to MCF approved recipients
- The pre-asset email
- The follow up email containing the digital assets
- Provide individual on boarding technical support where requested

Online Donations service provider- **Freemasonry Gives**

- To set up Online Donation portal for the Relief Chest

Safeguarding your personal information

All personal and other information collected from donors is stored securely by the Relief Chest Scheme according to the Relief Chest Scheme Records Management Policy. Records are kept only for as long as the Relief Chest is legally required. Information is retained in accordance with statutory and regulatory requirements and is destroyed securely at the end of the retention period.

Personal information collected electronically by online forms is encrypted. The Relief Chest Scheme has appropriate technical controls in place to protect all personal and other information and these are subject to routine monitoring.

Personal and other information collected are not transferred overseas, and the servers on which such information is stored are located in the U.K.

Relief Chest staff are trained to handle personal information in accordance with appropriate data protection policies and procedures.

Your personal information and your rights / accessing and updating your personal information

- You have a right to ask for details about the information we hold about you
- You have a right to ask us to stop processing your personal information if it is not necessary for the purposes for which you provided the details (e.g. to process a donation)
- You have a right to rectify your personal data to ensure the information we hold about you is accurate and up to date
- You have a right to ask us to erase/delete any personal information we hold about you, unless the Relief Chest needs to retain it for a legitimate purpose

Our third party data processors

The Relief Chest Scheme may receive your personal information from third parties such as Givetap.co.uk for digital and online donations, Charities Aid Foundation (CAF) Just Giving, etc. who share information with us in order to pass your donation into a Relief Chest. These independent third parties will only do so when you have indicated that you wish to support the Relief Chest Scheme of the Masonic Charitable Foundation. When you provide your personal details, look for and check the privacy policy of such organisations to find out how they will process your information.

Updating our Privacy Notice

We may update or amend this Privacy Policy from time to time, for legal compliance or to meet our changing business requirements. When we update our Privacy Policy, we will take appropriate measures to inform you. Any updates or amendments will be posted on [our privacy policy page](#)

How to contact us

If you have any concerns or queries about your personal information, please contact:

Brenda Nurse, Company Secretary, Data Protection Lead
Masonic Charitable Foundation
Freemasons' Hall
60 Great Queen Street London
WC2B 5AZ

Telephone number: 020 3146 3333 / Email address: bnurse@mcf.org.uk

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