



## **Relief Chest Scheme – Privacy Policy for Donors**

**This policy is effective from 25 May 2018**

### **INTRODUCTION**

The Relief Chest Scheme is committed to ensuring the privacy of personal information we collect from our donors and Relief Chest representatives. This Privacy Policy 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 PERSONAL INFORMATION WE MAY COLLECT**

- 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

### **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 Scheme Operating Manual and Rules
- 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 etc.)
  - To make amendments to the Direct Debit instruction (change bank account details, cancel the Direct Debit etc.)
- **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 acknowledgements, receipts,

subscribers lists or regular statements according to the Relief Chest Scheme Operating Manual and Rules

- ii) 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**

- i) 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
- ii) Personal information of donors may be forwarded to legacy Masonic charities who are taking part in festivals (Royal Masonic Trust for Girls and Boys, Royal Masonic Benevolent Institution, Masonic Samaritan Fund and the Freemasons Grand Charity) for honorific purposes and to issue a receipt/thank you letter

The Relief Chest Scheme may use third party processing systems to check personal information you provide or for mailing purposes:

- **BOTTOMLINE TECHNOLOGIES**

- i) When setting up a paperless Direct Debit (online or by phone) to verify bank details, ownership of the account and your address
- ii) To print and post thank you letters, receipts and Relief Chest monthly statements to donors and Relief Chest representatives

## **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 document Retention Schedule. 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 Everyday Hero for online donations, Vir2 Limited for text donations and 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 POLICY**

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 the Website [www.mcf.org.uk](http://www.mcf.org.uk)

### **HOW TO CONTACT US**

If you have any concerns or queries about your personal information, please contact our data protection lead:

Name: Leslie Hutchinson

Email: [info@mcf.org.uk](mailto:info@mcf.org.uk)

Phone: 020 3146 3333

Post: Data Protection Lead, Relief Chest Scheme, Masonic Charitable Foundation, 60 Great Queen Street, London WC2B 5AZ