

# WORCESTER MUNICIPAL CHARITIES (CIO)

Worcester Municipal Charities (CIO) Registration Number:1166931

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## Data Protection Policy

Last reviewed 11th August 2023

### Definitions

<b>Charity</b>	means Worcester Municipal Charities (CIO), Registered Charity No. 1166931
<b>GDPR</b>	means the General Data Protection Regulation.
<b>Responsible Person</b>	means the Office Manager.
<b>Register of Systems</b>	means a register of all systems or contexts in which personal data is processed by the Charity.

### 1. Data protection principles

The Charity is committed to processing data in accordance with its responsibilities under the GDPR.

Article 5 of the GDPR requires that personal data shall be:

- a. Processed lawfully, fairly and in a transparent manner in relation to individuals;
- b. Collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes; further processing for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes shall not be considered to be incompatible with the initial purposes;
- c. Adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed;
- d. Accurate and, where necessary, kept up to date; every reasonable step must be taken to ensure that personal data is not inaccurate, having regard to the purposes for which they are processed, are erased or rectified without delay;
- e. Kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the personal data are processed; personal data may be stored for longer periods insofar as the personal data will be processed solely for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes subject to implementation of the appropriate technical and organisational measures required by the GDPR in order to safeguard the rights and freedoms of individuals; and
- f. Processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures."

## **2. Disclosure and Destruction of Information**

- a. Any person may request in writing by post or email
- b. A copy of the information the Charity holds (to be provided in a timely manner).
- c. Deletion of the information we hold about them.

## **3. General provisions**

- a. This policy applies to all personal data processed by the Charity.
- b. The Responsible Person shall take responsibility for the Charity's ongoing compliance with this policy.
- c. This policy shall be reviewed at least annually.

## **4. Lawful, fair and transparent processing**

- a. To ensure its processing of data is lawful, fair and transparent, the Charity shall maintain a Register of Systems.
- b. The Register of Systems shall be reviewed at least annually.

## **5. Lawful purposes**

- a. All data processed by the charity must be done on one of the following lawful bases: Consent, contract, legal obligation, vital interests, public task, or legitimate interests, see ICO guidance [www.ico.org.uk](http://www.ico.org.uk). In general, the Charity will only hold personal data to comply with a legal obligation but may rely on Consent or Legitimate Interest for certain types of data.
- b. The Charity shall note the appropriate lawful basis in the Register of Systems
- c. Where consent is relied upon as a lawful basis for processing data, evidence of opt-in consent shall be kept with the personal data.

## **6. Data minimisation**

- a. The Charity shall ensure that personal data is adequate, relevant, and limited to what is necessary in relation to the purposes for which it is processed.

## **7. Accuracy**

- a. The Charity shall take reasonable steps to ensure personal data is accurate.
- b. Where necessary for the lawful basis on which data is processed, steps shall be put in place to ensure that personal data is kept up to date.

## **8. Relief in Need Grant Applicants**

- a. The Charity requires applicants for a relief in need grant to discuss the application with a support worker who will endorse the application form.
- b. The form requests personal information about the applicant which may also include information about the people who live with the applicant.
- c. The applicant will be informed of this data protection policy by the support worker and consent by the applicant for the Charity to use and share their data will be required on the application form before the Trustees can consider making a grant.

## **9. Educational Grant Applicants**

- a. The grant application form requesting personal information will follow our Data Protection Policy, which can be found on our website [www.wmcharities.org.uk/pdfs/dataprotectionpolicy.pdf](http://www.wmcharities.org.uk/pdfs/dataprotectionpolicy.pdf)
- b. The form requests personal information about the applicant which may also include information about the people who live with the applicant.
- c. The consent of the applicant for the Charity to use and share the personal information provided will be required before the trustees can consider making a grant.

## **10. “Special Category Data” for Grant Applicants**

- a. The information on the application form for a grant may include details of the applicant’s physical or mental health, which is “Special Category Data” because it is considered to be of a more sensitive nature. This information will be shared only within the personnel of the Charity and with our referral partners and support workers for the following reasons:
  - To consider the applicant’s suitability for a relief in need grant or an education grant under the Charity’s constitution following the Charity’s Policies and Practices.
  - To communicate with the applicant.
  - To facilitate any grant agreed.

## **9. Almshouse Flat Applicants/Residents**

- a. The Accommodation application form requesting personal information will follow our Data Protection Policy, which can be found on our website [www.wmcharities.org.uk/pdfs/dataprotectionpolicy.pdf](http://www.wmcharities.org.uk/pdfs/dataprotectionpolicy.pdf)
- b. The information the Charity requests includes personal information about the resident which may also include information about close family members and friends.
- c. The consent of the applicant for the Charity to use and share the personal information provided will be required before the trustees can consider an application for an Almshouse Flat.

## **10. “Special Category” Data for Almshouse Flat Applicants and Residents**

- a. The information requested from an applicant/resident of an Almshouse Flat may include details of the applicant/residents physical or mental health and religion or faith which is “Special Category Data” because it is considered to be of a more sensitive nature. This information will be shared only within the personnel of the Charity and with our referral partners and support workers for the following reasons:
  - To communicate with the applicant/resident.
  - To assist the applicant/resident with their medical and social needs.
  - To access if the applicant/resident’s needs are compatible with the accommodation and comply with the Charity’s Constitution

## **11. Archiving / removal**

- a. To ensure that personal data is kept for no longer than necessary, the Charity shall annually review the personal data that it holds, considering what data should/must be retained, for how long, and why.

## **12. Security**

- a. The Charity shall ensure that personal data is stored securely using appropriate software that is kept-up-to-date and password protected. Where the data is held in paper form, it will be stored in a locked room.
- b. Access to personal data shall be limited to personnel who need access and appropriate security shall be in place to avoid unauthorised sharing of information. The Charity's authorised personnel shall each be responsible for the storage and disposal of the shared documents provided to them by the Charity's office.
- c. When personal data is deleted this should be done safely such that the data is irrecoverable.
- d. Appropriate back-up solutions shall be in place.

## **13. Breach**

In the event of a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data, the Charity shall promptly assess the risk to people's rights and freedoms and if appropriate report this breach to the ICO [www.ico.org.uk](http://www.ico.org.uk)

## **14. Complaints**

Individuals do have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK's supervisory authority for data protection issues [www.ico.org.uk](http://www.ico.org.uk) We would, however, appreciate the chance to deal with any concerns you may have before you approach the ICO, so please feel free to contact us first.

## **15. Responsible Person**

The data the Charity collects is held at the office of Worcester Municipal Charities (CIO) at the above address. The Data Officer responsible is Maggie Inglis who can be contacted by email [admin@wmcharities.org.uk](mailto:admin@wmcharities.org.uk) or Telephone: 01905 317117.

Our partner organisations are responsible for the information we share with them.