



The Friends of Bank Hall

Registered Charity 1145792

Data Protection Policy addressing the General Data Protection Regulation (GDPR)

Organisational Context

The Friends of Bank Hall (registered charity 1145792) is a voluntary organisation which has the aim “TO PROMOTE THE EDUCATION OF THE PUBLIC BY PRESERVING FOR THE BENEFIT OF THE PUBLIC, BANK HALL IN BRETHERTON, LANCASHIRE. TO PRESERVE ITS ARCHITECTURE, HERITAGE AND GROUNDS AND THE NATURAL AND ECOLOGICAL ENVIRONMENT AND TO SUPPORT (BUT NOT EXCLUSIVELY) HERITAGE TRUST FOR THE NORTH WEST (REGISTERED CHARITY 508300)”.

Both The Friends of Bank Hall (FoBH) and the former Bank Hall Action Group (BHAG) have no employees; FoBH is managed by 16 Trustees and is an independent registered charity, which is supported by a pool of Members and non-member Volunteers all of whom give up their time for free. From time to time, additional volunteers come forward and are called upon to assist with the Voluntary work of the FoBH.

The Trustees of FoBH is composed of the following Officers: Chairperson, Vice Chairman, Secretary, Treasurer, Publicity Officer and Membership Secretary. BHAG is no longer active but remains in name for the time being. Insurance for our activities is currently provided by the Heritage Trust for the North West (i.e. public liability insurance). Enrolled membership (May 2018) ~36 adults members are to be aged 16 and over.

Bank Hall, Bretherton is a 17th Century Manor House which became derelict and in a hazardous condition is now undergoing Restoration

General Statement

The Friends of Bank Hall require some personal information from people in order to operate effectively. As volunteers in this group, but all with professional backgrounds; the core committee take data protection very seriously and as such make every effort to capture the minimum amount of information possible from individuals who interact with our group. This policy has been put together to demonstrate that FoBH are compliant with the General Data Protection Regulations, that we collect and process data lawfully, with fairness and transparency, the document summaries;

- the specific documents where we capture personal information;
- the purpose of each document and the data collection activities,

- how we maintain accuracy;
- specifically, what information we need to capture;
- how long we will require the information for and why;
- who we capture this information from; and
- how we intend to keep information confidential and secure.

Friends of Bank Hall act as both a **Controller** and **Processor** under the definitions in the regulations:

- A controller determines the purposes and means of processing personal data.
- A processor is responsible for processing personal data on behalf of a controller.

Lawfulness, Fairness and Transparency

To ensure the people we interact with are clear about why we need information and what we do with it, there are transparent statements on documents that we use to capture information. These have recently been updated in line with GDPR and our trustees and members have been issued with these to confirm their acceptance of the terms.

Data Collection activities

| Document | Purpose | Groups Impacted | Required information (minimised) | Retention Period | Accuracy Checks | Storage / Safety Points |
|---|--|---|--|--------------------------------|--|---|
| Visitors Book | To record the number of visitors, distance travelled and size of group / party attending events. This is required to assist us with funding applications, to be able to prove visitor numbers. | General Public – visitors to the site | Name of group leader Number of visiting party (adults and children) Town of origin | Indefinite (historical record) | Relevant at time of entry in the log – not checked and not used for subsequent contact | Physical book which is stored safely by the Secretary and used at events. |
| Charity and Entrust Registration Details | Core committee members are registered with Entrust and the Charites | Charity Commission: Key Officers of the group Entrust: All Trustees | Name Address Date of Birth Education details Occupation details | Indefinite (historical record) | Updated annually as required | Stored securely electronically and physically by the Secretary. |

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|----------------------------|---|----------------------------------|---|--|--|---------------------------------------|
| | commission as trustees – this is required for legal purposes. | | | | | |
| Trustees Details | Personal details of the core trustees is required for the purpose of the clerical administration of the group. | All Trustees | Name Address Contact Telephone Email Address | As long as a trustee is in post. | Annually or as advised by the individual | Secretary – electronic and physical |
| Membership Register | To record the names and contact details of our members and friends, to allow communication | All Members and Friends (opt in) | Name Address Contact Telephone Email Address | One year (renewed annually) | Annually | Membership Secretary - electronically |
| Volunteer Register | To record the names and contact email of our volunteer pool, to allow communication of volunteer events and news | Volunteer pool (opt in) | Name Email address | Until requested to be removed | On advice | Email distribution list only |
| Gift Aid Forms | To record details of UK Tax payers who make a donation to group funds and are willing to allow Gift Aid to be claimed, this information is passed to HM Revenue and Customs | Donation givers (opt in) | Name Address Donated amount | Six Years in order to comply with HMRC regulations | Not required, one off | Physical copy, kept by Secretary |
| Legacy Leaflets | To record the details of cash donors. These | Donation givers | Name Address | Until legacy is gifted | On advice | Physical copy kept by secretary |

| Document | Purpose | Groups Impacted | Required information (minimised) | Retention Period | Accuracy Checks | Storage / Safety Points |
|--|---|--|--|--|--------------------------------|---|
| | may be legacy given after death. Required to claim donations | | Donated amount | | | |
| Email List for News Sheets & Important Communications | To send out Quarterly News Sheets to Supporters & Advise of Events and other Important Information | Supporters (May or may not be Members) | Name Address Email Address (Opt In) | Until Requested to be Removed | Not Required | Email distribution list only |
| Administrative Documentation | Various administrative notes made throughout meetings and in completing transactions for administration of treasury. | Members, suppliers, volunteers, outside bodies / individuals | Name – may be referenced in administrative documents | Indefinite – required for audit trail of group history, decisions and transactions | Not required, historic records | Physical and electronic, held by secretary, treasurer and other trustees. |
| Facebook Groups | There are a number of social networks for members which are hosted through facebook, for the purpose of sharing information and news about the Hall | Opt in members / volunteers and interested parties | Name – linked via Facebook | N/A | N/A | N/A |

Storage of Data

All personal data noted above is stored by one of the following individual officers of the group;

- Secretary
- Membership Secretary
- Treasurer
- Trustees

All personal information is stored on individual technology products, but is held securely in password protected accounts that only the above listed officers can access. Any physical information is stored in individual's homes with access limited with physical security. Information is not shared with third parties without the prior consent of individuals.

Contact Details

In order to facilitate the operation of the group, individual members and friends may choose to share their contact details with other members. However, contact details will not be shared with anyone other than the officers of the group and with The Heritage Trust for the North West without prior consent of the individual.

Policy Review Cycle

This document will be reviewed on an annual basis, or sooner should conditions trigger a requirement.