

# **THE CATENIAN ASSOCIATION BENEVOLENT & CHILDREN'S FUND**

*Registered in England: Charity number 214244*

## **PRIVACY STATEMENT TO APPLICANTS & BENEFICIARIES**

### **Introduction**

The Trustees of the Catenian Association Benevolent & Children's Fund ("Benevolent Fund") are committed to ensuring that confidentiality and sensitive treatment of your personal information are ingrained into their processes and procedures. They will follow six guiding principles concerning your privacy. Personal information will be:

1. Collected only for the purposes of determining your eligibility to receive assistance, the type and amount of help that is appropriate and for the proper administration of loans and grants. It will be used for no other purpose.
2. Accurate, relevant and only what is necessary for the above purposes.
3. Accurate and up to date when it is used for decision making or administration.
4. Kept for no longer than is necessary.
5. Kept secure.
6. Stored in systems set up with a view to giving limited access to information and maintaining confidentiality.

### **What type of personal information we collect**

We collect the following types of information from you:

- Contact details,
- Financial situation, and
- Additional information supplied by you in support of your application for assistance.

### **How we collect your information**

The information we hold is principally provided by you in the application form and any supplementary information provided by you.

We may also collect information from publicly available resources such as HM Land Registry and the Probate Registry.

### **Where we collect your information**

The information that we have comes either from you directly or from you via a member of your Circle Benevolent Board or the Director of your Province.

### **How we use your information**

We use the information solely for the purpose of administering your grant application and for no other purpose.

### **Legal basis**

The use of your information for the purposes set out above is lawful because one or more of the following applies:

- Personal information is held solely and lawfully to enable the Trustees help persons in need and is essential for that purpose. It is therefore in the legitimate interests of the

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Trustees and you that we hold such data in order that we can progress your application for funding.

- By fulfilling its charitable objects to help persons in need, the Charity is fulfilling its public interest function.
- By completing and signing the application form, you will have given consent to us using the information for that purpose, based on the way that you provided the information to us. You may withdraw consent at any time by emailing us at either of the email addresses shown at the end of this document. This will not affect the lawfulness of processing your information prior to your withdrawal of consent being received and acted upon.

### **Data Controller**

The Data Controller responsible for compliance with Data Protection Regulations is Catena Trustees Ltd ("CTL"). CTL is the Custodian Trustees of the Benevolent Fund. The Trustees of the Benevolent Fund are the members and directors of CTL.

### **Recipients of personal information**

The Catenian Association Ltd (TCAL) acts as a Data Processor in the following limited functions:

- Archived paper files and backup copies of electronic files are held in secure conditions at the Catenian Support Services Office;
- CTL's financial system is operated by the Financial Administrator at TCAL including the processing of payments to and receipts from beneficiaries of the Benevolent Fund;
- Correspondence is occasionally received at TCAL addressed to the Benevolent Fund. This is forwarded immediately to the Clerk to the Trustees. No copies are made;
- Members of your Circle Benevolent Board (including your Provincial Director) may from time to time hold personal information provided by you when advising on or preparing an application or reapplication, or in connection with a Loan Review;
- Provincial Directors and other very senior officers of the Association occasionally attend meetings of the Trustees as guests for the purpose of gaining a better understanding of the proceedings. They may therefore have sight of papers relating to applicants outside their own Province. They do not receive such papers before the meeting and are not permitted to take them away after the meeting. They are formally reminded by the chairman of the meeting of the need for confidentiality.

The work of The Catenian Association Ltd on behalf of CTL is regulated by a formal Agreement that requires the former to adhere to the principles and practices within this Privacy Statement.

### **Applicants and beneficiaries outside the United Kingdom**

CTL is subject to English law. If you are not resident in the UK the same safeguards apply when sending personal information across borders as they are within England. These include sending by secure postal services and couriers and, if by email, by use of password protected attachments.

### **Retention policy**

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Your personal information is held in individual paper and electronic files.

Your file is retained as an open file so long as an application is under consideration or a loan has been made and is outstanding.

Your file will be archived when an application is withdrawn, declined, a grant paid or a loan previously made is repaid. An archived file will only be re-opened if a further application is made or at your request for information.

Your archived file will be retained for ten years while you remain eligible for further help from the Benevolent Fund; or for four years after the last transaction on the file should you die or cease to be a member of the Catenian Association; whichever is the earlier. It will then be destroyed.

### **Your rights**

You have the right to:

- Request disclosure of information about you;
- Require correction of inaccurate information about you;
- Removal of irrelevant information and deletion of all information if it is being held without compliance with the retention policy;
- Restrict the way in which we are dealing with and using your information.

### **Data loss**

If at any time the Trustees believe that personal information they hold about you has been obtained by anyone other than the Trustees or recipients described above, they will inform you as soon as possible and in any event within the time limit set for the time being by law.

### **Questions, concerns and complaints**

Questions, concerns and complaints should in the first instance be addressed to the Clerk to the Trustees. If the matter relates to the Clerk's actions or lack thereof then it should be referred first to the Chairman of Trustees. Contact details are below.

If matters cannot be resolved satisfactorily you have the right to complain to the Information Commissioner's Office at [www.ico.org.uk](http://www.ico.org.uk).

### **Contact details**

Clerk to the Trustees: Phil Roberts  
39 Beechfield, Hilldale, Parbold, Lancs. WN8 7AR  
[phil@robertsreal.com](mailto:phil@robertsreal.com)

Chairman of Trustees: John Hogan  
38 Charlecote Rd, Poynton Cheshire SK12 1DJ  
[jhoganaccountancy@hotmail.co.uk](mailto:jhoganaccountancy@hotmail.co.uk)

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**Amended 21<sup>st</sup> July 2026.**