



Data Protection Guidance (Issued January 2013)

1. Who should read this Guidance

This Guidance must be read by anyone who assists an Applicant in the completion and submission of a 'Joint Application Form' and supporting documents. Everyone who does this is acting on behalf of The Freemasons' Grand Charity, Royal Masonic Trust for Girls and Boys and Masonic Samaritan Fund (**the Charities**), even if the Charities have not asked the person to do so.

2. Background and definitions

The Data Protection Act 1998 (**the Act**) establishes a framework of rights and duties which are designed to safeguard the right to privacy with respect to the processing of personal data. Personal data is anything which identifies an individual, either on its own or by reference to other information. Processing means obtaining, recording or holding data and carrying out various operations such as organising, adapting, disclosing or erasing it. The Charities are committed to protecting the rights of individuals in accordance with the provisions of the Act. For further information visit www.ico.gov.uk.

3. Purpose of Guidance

This Guidance sets out the responsibilities of anyone acting on behalf of the Charities during the application and grant award process (**you**). The guidance must be followed as a breach of responsibilities under the Act could result in embarrassment for the individuals we seek to help, damage to the reputation of the Charities and Freemasonry and, in serious cases, it may have significant legal and financial implications.

4. Your responsibilities

- You must only act on instructions issued by the Charities; and
- You must protect personal data against unauthorised or unlawful processing and against accidental loss, destruction or damage.

5. How to use, send, store and dispose of personal data

The following guidance is provided to assist you in meeting your responsibilities.

General

- Always care for other people's personal data in the same way that you would want anyone else to care for yours.
- The personal data and information you collect must only be used for making an application to the Charities. You must not keep or use it for any other reason without the explicit consent of the individual concerned. For example, you should not pass contact details to the Lodge for the purposes of maintaining contact.
- Ensure that personal details provided to the Charities are accurate and up-to-date and notify the Charities immediately of any changes or errors.
- Avoid recording personal opinions not based on fact about the applicant and/or any other individual. The individual concerned has the right to see your comments so you should never write anything that you would not wish them to see.

Storing and disposing of data

- Ensure that all manual files are securely stored out of sight and locked away. A record should not be accessible to anyone who has not signed the declaration on the related application form, including wives, partners and family members.
- Do not keep personal data for any longer than it is needed. All application forms and supporting materials, including copies, must be destroyed after 6 months.
- Destroy files and information using a confidential method, such as shredding or burning for manual records and permanently deleting electronic files.

Electronic security

- Take all reasonable precautions to ensure the confidentiality of personal data stored on computers, laptops or other electronic devices, or transmitted via email.
- Install firewalls and antivirus software on computers and download the latest patches or updates on a regular basis.
- Password protect computers, memory sticks, equivalent devices and files. Use strong passwords containing a mix of upper and lower case letters, numbers and symbols. Where possible use encryption when storing or transmitting data that would cause damage or distress if it were lost or stolen.
- Never disclose your passwords to anyone. Do not use autocomplete or 'remember me' when entering passwords.

Email

- Ensure your email account can only be accessed by you. Do not use a joint email account.
- When typing the name of the recipient into an email, be careful to choose the right address if the autocomplete function suggests several choices.

Accidental disclosure, loss and destruction of personal data

- Take all reasonable steps to prevent accidental loss, disclosure or destruction of personal data.
- In public places, take sensible steps to prevent the loss or theft of manual files and electronic equipment.
- Address mail to a named recipient and mark the envelope 'Confidential – for addressee only' ensuring that appropriate postage is applied.
- Avoid giving personal data by telephone unless you are certain that the caller is the person he/she claims to be, and is an appropriate person to receive the data.
- Inform the Charities immediately of incidents where personal data may have been lost, stolen, viewed by or disclosed to unauthorised individuals.

6. Example scenarios

To check your understanding of this Data Protection Guidance, consider the following scenarios:

- A Visiting Brother takes a copy of a completed application form in case the original is lost. He stores this in a ringbinder on the bookcase in his guest room, which is regularly used by his grandchildren. Has he taken appropriate steps to prevent an unauthorised person obtaining access to the personal data on the form?
- A Visiting Brother intends to submit an application form via email, using the email account he shares with his wife. Can he do this?
- An unattached widow applies to the Charities. The Lodge Almoner asks the Visiting Brother for her address so he can send her details of local fellowship groups. Can this information be passed on without the permission of the widow?
- A Visiting Brother disposes of a list of applicant names, addresses and contact details by tearing them in half and taking them to the local recycling centre. Is this a confidential and secure method of disposal?

The answer to all of the questions above is **no**.

If you require clarification or further information on any part of this Data Protection Guidance contact the Reception Manager, Charities Reception, Freemasons' Hall, 60 Great Queen Street, London WC2B 5AZ
applications@freemasonrycares.org