

# Privacy Statement

## For the benevolent fund of the College of Optometrists and the Association of Optometrists

This Privacy Statement outlines the way in which we use and disclose personal data that is provided to us.

The Benevolent Fund of the College of Optometrists and the Association of Optometrists (Henceforth referred to as The Charity) recognises that your privacy is very important, so it is important to us that you are confident with the way we handle your personal information. We fully comply with the General Data Protection Regulations (GDPR) and the Privacy of Electronic Communications Regulations (PECR).

### Personal Data

Personal data includes any data that relates to a living individual who can be identified from that data. This may include an individual's name, address, telephone numbers and/or email addresses, bank details, and other financial, health and background information.

We collect information about individuals who apply for our support, our beneficiaries, our volunteers, our staff, our trustees, and individuals working for other organisations we partner with.

### How we collect personal data

The charity receives and stores personal information supplied to us in writing, via email, via the telephone, in person or online when applying, enquiring, or registering for help, employment, trusteeship, or volunteering opportunities, when attending events or donating money to the Charity and when partnering with other organisations to support our aims.

We may also receive personal information from third parties, for example, a welfare officer, charity, agency or organisation who refers you to our service.

### Information we hold

The information we hold about you includes information provided directly by you (or another person acting for you) when you completed your application form or gave further information to a Benevolent fund Trustee, or person acting on behalf of a Trustee e.g. the Administrative Secretary, during a visit or by any other means of communication

Other information that is publicly available may also be recorded e.g. your GOC registration details available from the GOC register. You should be aware that the information you give will be shared with the 10 current Trustees of the charity.

The information the Benevolent Fund holds may include your:

- Name
- Date of birth
- Address
- Gender
- Marital status
- Family members
- Professional qualifications and professional organisation member numbers
- Basic career details

- Property occupier status i.e. whether you own or rent the property you live in
- Personal/household/spouse's income
- Personal/household/spouse's outgoings
- Financial assets
- General financial situation which may include your debts, tax liabilities and other relevant details
- Health information
- GP's name
- Referee details
- Contact details

We keep records of communications made with you – by letter, email, text message or telephone.

Basic details may also be shared with the Association of Optometrists and/or College of Optometrists if you wish us to assist you with the paying of professional fees.

### **Purpose of using personal data**

The Charity principally collects personal data to provide applicants and beneficiaries with services, products or information. The *lawful bases* we use to process this data are 'legitimate interests' and, in the case of sensitive data, 'special category'. The *specific condition* we use for processing 'special category' data is 'legitimate activities'. Occasionally, we may also use 'legal obligation' or 'consent' to process personal data; some examples are given below:

- When an individual applies for support from The Charity, we use 'legitimate interests' to process the information needed to contact them about their application.
- When we require information relating to an applicant's health to help us assess their needs, we use the lawful basis of 'special category' and the specific condition of 'legitimate activities' to process this data.
- If we need to process personal data to comply with a legal obligation to disclose employee salary details to HMRC, we would use 'legal obligation' as our lawful basis.
- If we want to send electronic marketing to applicants and beneficiaries, we would use 'consent' as our lawful basis, in accordance with the Privacy of Electronic Communications Regulations (PECR).

### **Disclosure of Information**

Your data is treated as strictly confidential and is only disclosed to parties who have a need to access it, to fulfil the charity's objectives.

The Charity may disclose personal data to other employees including the Charity Trustees. We do not permit these parties to use such information for any other purposes than to perform the service instructed by us.

We may also share personal data with suppliers, known as 'data processors', to process data on our behalf, for example to deliver goods or services to beneficiaries. For example, with your permission, we may share your personal data with a debt/insolvency advisor, in order to obtain specific, expert advice to help you.

### **How long we keep your personal information**

When the personal data is no longer needed, it will be destroyed or permanently rendered anonymous. Examples might be that the application process has been completed, volunteering, employment or trusteeship terminates. We will hold your information for a period in accordance with our data retention policy. Please see our full Data Protection Policy for details.

## **Storage and security of personal data**

To prevent unauthorised access, maintain data accuracy, and ensure the correct use of information, we have put in place appropriate physical, electronic, and managerial procedures to safeguard and secure the information we collect.

Individuals have the right to request access to and rectification or deletion of their personal data or restrict processing at any point from when personal data is provided to us.

The Charity will comply with all legal obligations including GDPR when we hold your data. If you have any reason why we should amend, delete or restrict use of your data, please contact us to discuss this..

## **What we do if you choose to tell us about your experience of our service**

Where beneficiaries of The Charity have provided information about their experience of our service, we will explain what the information will be used for. It will always be used anonymously unless you agree otherwise. If we wish to use your information as a case study, for communications including PR and media activity, digital and social media, campaigning, fundraising materials and internal communications, or to help us raise awareness of our service, we will ask your permission first.

## **Contact us**

- If you have any questions or comments about our privacy practices or this Privacy Statement
- If you want to make use of any of the above rights, or other rights that you may have in relation to your personal data
- If you wish to view our full Data Protection Policy
- If you have other questions or requests

Email: [admin@opticalbenfund.com](mailto:admin@opticalbenfund.com),

Phone: 01787 223800

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