

# DOWN MASONIC WIDOWS' FUND

## New Application Form for Assistance

Treasurer:-

David Woodrow

8 The Grange

Saintfield BT24 7NF

Tel 078 1100 9876

Email

Treasurer@downwidows.org

*Founded*



*1893*

Secretary

Noel W Sufferin

1 The Grange

Lisburn. BT28 3XX

Tel:- 028 9266 5306

Mob:- 078 0269 9061

Email

Secretary@downwidows.org

# Application form

## For

## New Applicants

## Annuitants

# Down Masonic Widows Fund

[www.downwidows.org](http://www.downwidows.org)

Registered with The Charity Commission for Northern Ireland NIC100079

# **DOWN MASONIC WIDOWS' FUND**

## **New Application Form for Assistance**

### **Notes for completion of New applications.**

Due to the introduction of the General Data Protection Regulation (GDPR) details of how we store the information which we hold on our annuitants, how we deal with it and their rights are attached. It is important that this information is given to the applicant and that it is brought to their attention. Please note that they **MUST** sign the Application form to confirm that they have received the privacy statement and explain to them that it needs to be retained by them.

The Application form needs to be completed in full and all details recorded. Each applicant will be given a permanent unique reference number and this will be used to identify them on all future documents.

Confidentiality is most important. The completed application form and the information contained therein must be treated in the strictest confidence. Forms must not be copied, retained or left where members of the Lodge or the public have access to the information. This would be a breach of GDPR and could have dire consequences on our Fund and repercussions for the Lodge.

Please ensure that no medical details are included as this would not be compliant with the GDPR.

Make sure that the financial income is correctly inserted and that it is weekly and that the correct boxes are completed. An error here can affect the outcome of the application. You need to enquire with the widow as to how her benefits are made up.

If you have any queries, please do not hesitate to contact me for clarification.

Noel Sufferin Secretary.

# DOWN MASONIC WIDOWS' FUND

## New Application Form for Assistance

<input type="text"/>	District Charity Committee.	Lodge No <input type="text"/>	Ref No:- <input type="text"/>
----------------------	-----------------------------	-------------------------------	-------------------------------

### APPLICANT DETAILS ( Must be completed in full )

Surname	<input type="text"/>	Tick this box if widow lives on her own	<input type="checkbox"/>
First Names	<input type="text"/>		
Address	<input type="text"/>	Number of <b>dependant</b> children in house	<input type="text"/>
	<input type="text"/>	<u>Housing Type</u>	
Postcode	<input type="text"/>	Own House	<input type="checkbox"/>
Tel No.	<input type="text"/>	Relative's House	<input type="checkbox"/>
Date of Birth	<input type="text"/>	Rented House	<input type="checkbox"/>
		Nursing Home	<input type="checkbox"/>

### Details of Masonic Connection

My Husband	<input type="checkbox"/>	Fore names	<input type="text"/>	Surname:-	<input type="text"/>
Brother	<input type="checkbox"/>	Member From:-	<input type="text"/>	To:-	<input type="text"/>
		Date of Death:-	<input type="text"/>	Age:-	<input type="text"/>
		Occupation:-	<input type="text"/>	Lodge No:-	<input type="text"/>

### Lodge Almoner / Visiting Brother Details

Name: (Print)	<input type="text"/>	Date of Visit:-	<input type="text"/>
Signature:-	<input type="text"/>	Mobile No:-	<input type="text"/>
Email:(Print)	<input type="text"/>	Tel No:-	<input type="text"/>

To be completed by at least **TWO** of the Officers of the Lodge.

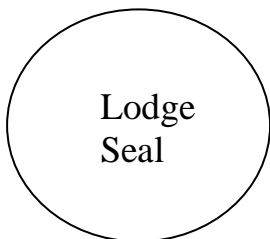
We recommend the foregoing application and certify that, to the best of our belief, the information contained within this form is correct.

Signature of Worshipful Master

Signature of Treasurer

Signature of Secretary

<input type="text"/>
<input type="text"/>
<input type="text"/>



Date:-

Secretary's Tel no:-

Secretary's Email:-

<input type="text"/>
<input type="text"/>

Completed form should be sent to the Secretary of  
**Your District Charity Committee.**

To be completed by the District Charity Committee.

Signature of Chairman

Signature of Secretary

Date Recommended by Charity Committee

<input type="text"/>
<input type="text"/>
<input type="text"/>

# DOWN MASONIC WIDOWS' FUND

## New Application Form for Assistance

<u>WEEKLY INCOME</u>	
Widow's Pension	£
State Pension	£
Occupational Pension	£
Late Husband's Employer Pension	£
Pension Credit	£
Incapacity Benefit / ESA	£
Disability Living Allowance	£
Personal Independent Payment PIP	£
Attendance Allowance	£
Income Support	£
Employment	£
Bereavement support payment	£
Investment Income	£
Rental Income from land etc	£
Other:-	£
	£
<b>TOTAL <u>WEEKLY INCOME</u></b>	<b>£</b>

<u>WEEKLY HOUSING COSTS</u>		
Mortgage Repayments <b><u>per week</u></b>	£ <input style="width: 100px;" type="text"/>	
Rates Gross	Less Rebate	Net Rates / Week
£ <input style="width: 100px;" type="text"/>	£ <input style="width: 100px;" type="text"/>	£ <input style="width: 100px;" type="text"/>
Rent Gross	Less Rebate	Net Rent / Week
£ <input style="width: 100px;" type="text"/>	£ <input style="width: 100px;" type="text"/>	£ <input style="width: 100px;" type="text"/>
<b>TOTAL <u>WEEKLY EXPENDITURE</u></b> FOR MORTGAGE, RATES & RENT		£ <input style="width: 100px;" type="text"/>
<p><b>Please note that details of general expenditure and living costs are not required, only Mortgage, Rates and Rent where applicable.</b></p>		

APPLICANT'S ASSETS, CAPITAL Etc		
---------------------------------	--	--

Details	Value	Comments
Own Dwelling House	£ N/A	Owned / Rented (delete one.)
Investments valued at	£	
Current Bank Account	£	
Deposit Account	£	
Post Office Account	£	
Building Society / ISAs	£	
Land or other dwellings	£	For land state acreage.

Should any applicant omit to give a full statement of income from every source, or withhold any information required by this form and the omission subsequently becomes known the grant will be liable to be withdrawn.

**The security and privacy of your personal information is important to us. The information given in this form and any supplementary information provided will be stored and processed by DMWF in accordance with the General Data Protection Regulation 2018. Please acknowledge receipt of the "Privacy Statement" attached by signing below, confirming that you agree that your information may be used in accordance with the details contained therein.**

Signature of Applicant  Date:-

Almoner / visiting Brother's observation on living conditions:- <u>DO NOT INCLUDE SPECIFIC HEALTH DETAILS</u>

If applicable has widow applied for:- PENSION CREDIT YES / NO  
RENT / RATE REBATE YES / NO

Form 06/23

[www.downwidows.org](http://www.downwidows.org)

Registered with The Charity Commission for Northern Ireland NIC100079

# DOWN MASONIC WIDOWS' FUND

## New Application Form for Assistance

Down Masonic Widows Fund: Data Protection Policy

(“Policy”)

### 1. INTRODUCTION

1.1 The Down Masonic Widows Fund (“DMWF”) needs to collect and use information about various individuals. DMWF is subject to the General Data Protection Regulation (“GDPR”) which imposes obligations upon DMWF as a data controller in relation to the protection, use, retention and disposal of such information about various individuals. This Policy sets out the procedures that are to be followed when dealing with Personal Data (as defined below).

1.2 The purpose of this Policy is to ensure that:

1.2.1 DMWF complies with data protection law and follows good practice;

1.2.2 DMWF takes appropriate steps to prevent a data protection breach; and

1.2.3 all Trustees are aware of their responsibilities under data protection legislation, and comply with the law.

1.3 Please refer to DMWF’s privacy notice (the “Privacy Notice”), a copy of which can be obtained from the Data Privacy Manager or on our web site [www.downwidows.org](http://www.downwidows.org)

### 2. USEFUL DEFINITIONS

2.1 The following definitions apply in this Policy:

“Data Controller” the DMWF is the data controller under GDPR, meaning that it determines when, why and how to process personal data. It is responsible for establishing practices and policies in line with GDPR.

“Data Privacy Manager” means the data privacy manager appointed by DMWF, contactable as follows:

Down Masonic Widows’ Fund,

1 The Grange, Lisburn, BT28 3XX

Telephone no: 02892 665 306 email:-  
[admin@downwidows.org](mailto:admin@downwidows.org)

“Data Processor” means any other party who processes personal information in accordance with the instructions of the DMWF.

“Personal Data” means any information about a living individual (a “data subject”) which includes names, addresses,

photos, identification numbers (for example, a National Insurance number), bank account details, online identifiers (for example, an email address, IP address etc.), and any sensitive personal data (for example, information concerning an individual’s health, race, political opinions or sexual orientation).

“processing” means anything that is done to personal data including collecting, recording, organising, storing, altering, retrieving, disclosing, destructing or erasing the data.

### 3. DATA PROTECTION PRINCIPLES

3.1 DMWF will adhere to the data protection principles set down in the GDPR which require Personal Data to be:

3.1.1 processed lawfully, fairly and in a transparent way (Lawfulness, Fairness and Transparency);

3.1.2 collected only for specified, explicit and legitimate purposes (Purpose Limitation) and not further processed in a manner that is incompatible with those purposes;

3.1.3 adequate, relevant and limited to what is necessary in relation to the purposes for which it is processed (Data Minimisation);

3.1.4 accurate and, where necessary, kept up to date (Accuracy);

3.1.5 kept in a form which permits identification of individuals for no longer than is necessary for the purposes for which the information is processed (Storage Limitation); and

3.1.6 processed in a way that ensures its security, using appropriate technical and organisational measures to protect against unauthorised or unlawful processing and against accidental loss, destruction or damage (Security, Integrity and Confidentiality).

3.2 With the exception of where processing is based on consent, DMWF shall satisfy itself that the processing is necessary for the purpose of the relevant lawful basis i.e. that there is no other reasonable way to achieve that purpose.

3.3 DMWF should document its decision as to which lawful basis applies to help demonstrate its compliance with the data protection principles.

3.4 Ultimately DMWF is responsible for, and must be able to demonstrate, compliance with the data protection principles listed above.

[www.downwidows.org](http://www.downwidows.org)

Registered with The Charity Commission for Northern Ireland NIC100079

# DOWN MASONIC WIDOWS' FUND

## New Application Form for Assistance

### 3.5 Lawfulness and Fairness

3.5.1 The GDPR requires that there is a legal justification for processing any Personal Data. For example, Personal Data may be processed by DMWF if:

- (a) the individual has given their consent;
- (b) the processing is necessary for the performance of a contract;
- (c) the processing is necessary for DMWF to comply with legal obligations e.g. equality monitoring;
- (d) the processing is necessary to protect the vital interests of the individual or another person;
- (e) the processing is necessary for the performance of a task carried out in the public interest; or
- (f) the processing is necessary for the purposes of legitimate interests of DMWF or a third party, except where those interests are overridden by the interests or fundamental rights and freedoms of the data subject.

3.5.2 It is not envisaged that DMWF processes any sensitive Personal Data. However, in the event that DMWF was to process any sensitive Personal Data, such as health information, one of the following conditions must be satisfied:

- (a) the individual has given their explicit consent;
- (b) processing is necessary to protect an individual's vital interests; or
- (c) processing is necessary for the establishment, exercise or defence of legal claims.

### 3.6 Consent

When relying on consent to process Personal Data, the individual must clearly indicate their consent either by a statement, or a positive action, to the processing. Individuals must be able easily to withdraw consent at any time. When written consent is obtained for processing, this must be retained.

### 3.7 Transparency

3.7.1 The GDPR requires that the DMWF provides individuals with certain information about how their Personal Data is being processed. This should be provided through a "Fair Processing Notice" which must be concise, clear and in plain language. The individual must also be informed of:

- (a) the identity of the Data Controller i.e. the DMWF;

- (b) the contact details of the Data Privacy Manager;

- (c) the purpose of the processing and the legal justification for processing;

- (d) who their Personal Data may be shared with;

- (e) how long their Personal Data may be kept for;

- (f) their rights under GDPR, as summarised at paragraph 5;

- (g) whether the provision of Personal Data is a statutory or contractual requirement, whether the individual is required to supply the information and the consequences of not supplying the information; and

- (h) whether their Personal Data will be used for automated decision making.

### 3.8 Purpose Limitation

DMWF must only collect Personal Data for specified, explicit and legitimate purposes. Personal Data may not be used for different reasons than those for which it was originally obtained.

### 3.9 Data Minimisation

DMWF must ensure that the Personal Data which it holds is adequate, relevant and limited to what is necessary. DMWF volunteers must only access Personal Data when performing their duties requires it. When it is no longer necessary to keep Personal Data, it must be securely destroyed.

### 3.10 Accuracy

Personal Data held by DMWF must be accurate and, where necessary, kept up to date. It must be corrected or deleted without delay when inaccurate. DMWF Trustees should ensure that the accuracy of Personal Data is checked when it is collected, and at regular intervals.

### 3.11 Storage Limitation

Personal Data must not be kept for longer than is necessary. The Data Protection Manager oversees the retention and destruction of personal data in compliance with this Policy.

### 3.12 Security, Integrity and Confidentiality

3.12.1 DMWF must ensure that the Personal Data it holds is protected by appropriate technical and organisational measures

# DOWN MASONIC WIDOWS' FUND

## New Application Form for Assistance

to prevent unauthorised access, accidental loss, destruction or damage to records.

3.12.2 Information and records relating to individuals will be stored securely and will only be accessible to Trustees where they need to access it. Paper records will be kept in a secure place, away from public areas, where unauthorised individuals or members of the public could view it. When not required, paper records will be kept in a lockable drawer or filing cabinet. When data is held electronically it will be protected from unauthorised access, accidental destruction and malicious hacking attempts. The DMWF will ensure that all Personal Data is non-recoverable from any computer system, drive or removable storage device previously used within the organisation, which has been passed on or sold to a third party.

3.12.3 All Trustees with access to a computer are to be provided with a password. When leaving their computer unattended, Trustees must either log out or ensure their screen is locked.

3.12.4 DMWF shall ensure that its IT systems are kept up to date to ensure the security and integrity of digital records.

#### 4. PERSONAL DATA BREACHES

4.1 A data breach is any (potential) unintended loss of control over or loss of Personal Data within DMWF's environment (e.g. loss or theft of data, equipment failure, hacking or unforeseen circumstances such as fire or flood). Preventing a data breach is the responsibility of all DMWF Trustees.

4.2 The person who discovers / receives a report of a breach must inform the Data Protection Manager immediately.

4.3 The Data Protection Manager will take steps to recover any losses and limit the damage caused by the breach. These steps might include:

4.3.1 attempting to recover the lost Personal Data or equipment;

4.3.2 the use of back-ups to restore data;

4.3.3 if the data breach includes entry codes or passwords, ensure that these are changed immediately.

4.4 The Data Protection Manager will undertake an assessment into the breach in order to ascertain the data which was involved, the cause of the breach, steps needed to remedy the breach and the effect on the Data Subject(s). A record must be kept of the each breach outlining the nature of the breach and steps taken (including whether the ICO was informed).

4.5 If the Data Protection Manager assesses that it is likely that there will be a risk to the rights of the individuals, the ICO must be notified without undue delay, and in any event within 72 hours of the breach coming to light.

4.6 When assessing the likely risk to individuals, you should consider whether the individual(s) are likely to suffer discrimination, identity theft or fraud, financial loss, damage to reputation, loss of confidentiality, or economic or social disadvantage.

#### 5. RIGHTS OF DATA SUBJECTS UNDER THE GDPR

5.1 Individuals have rights as to how DMWF can handle their Personal Data:

5.1.1 the right to be informed: DMWF shall keep data subjects informed of its processing activities through its Privacy Notice;

5.1.2 the right of access: a data subject may request access to the Personal Data which DMWF holds about them (known as a "Subject Access Request" and more fully explained at paragraph 6 below);

5.1.3 the right to rectification: if a data subject informs DMWF that Personal Data held by DMWF is inaccurate or incomplete, the data subject may request that it is rectified;

5.1.4 the right to erasure: a data subject may ask DMWF to erase their Personal Data. DMWF must comply with this request unless it has reasonable grounds to refuse;

5.1.5 the right to data portability: a data subject is entitled to receive a copy of their Personal Data and use it for other purposes;

5.1.6 the right to object: a data subject may object to DMWF's processing of their Personal Data at any time;

5.1.7 rights in relation to automated decision-making and profiling: a data subject has the right to challenge any decision that is made about them on an automated basis (subject to certain exceptions). DMWF is also required to comply with certain conditions if it uses Personal Data for profiling purposes.

5.2 Data subjects have the right to make a complaint at any time to the Information Commissioner's Office (the "ICO"), the UK supervisory authority for data protection issues. The ICO's details are as follows:

Information Commissioner's Office – Northern Ireland  
3rd Floor  
14 Cromac Place  
Belfast  
BT7 2JB  
Telephone: (028) 9027 8757 / 0303 123 1114  
Email: ni@ico.org.uk

#### 6. SUBJECT ACCESS REQUESTS

# **DOWN MASONIC WIDOWS' FUND**

## **New Application Form for Assistance**

Individuals have the right to request access to the Personal Data which DMWF holds about them. This is called a Subject Access Request. Subject Access Requests should be made in writing, and the identity of anyone making a request should be verified. One copy of the requested information must be provided free of charge, within one month of the request being received by DMWF. Trustees who receive a Subject Access Request should pass this on to the Data Privacy Manager who will be responsible for responding to the request.

### **7. SHARING PERSONAL INFORMATION WITH OTHERS**

At times, the DMWF may share Personal Data with others. DMWF shall obtain guarantees that the Personal Data it shares with others will be processed in accordance with data protection law. Where DMWF uses a data processor, a written data processing contract will be put in place between the processor and DMWF. Individuals will be informed if their Personal Data is to be shared with any third party.

### **8. DATA RETENTION & DISPOSAL**

8.1 The longer that Personal Data is retained, the higher the likelihood is of accidental disclosure, loss, theft and/or information growing stale.

8.2 All Personal Data kept by DMWF should only be retained for a maximum of four years (being the current year and three previous years). All Trustees have a responsibility to ensure that Personal Data is not retained beyond this period and if any Trustees uncover Personal Data which has been retained for more than four years, or is nearing this four year period, they should immediately inform the Data Protection Manager.

8.3 The Data Protection Manager will oversee the safe and secure destruction of the appropriate Personal Data and records.

### **9. AUDIT**

9.1 DMWF may, from time to time, test its systems and processes to assess compliance.

### **10. DATA PROTECTION IMPACT ASSESSMENTS**

10.1 The GDPR requires that "Data Protection Impact Assessments" are carried out by DMWF if its processing activities present a "high risk" to the rights of individuals.

10.2 Advice should be sought from the Data Privacy Manager on carrying out such an assessment.

### **11. SUMMARY OF TRUSTEES GUIDELINES AND OBLIGATIONS**

11.1 Trustees should not give out confidential Personal Data except to the data subject, following the Data Privacy Manager's authorisation. In particular, Personal Data should not be given to someone from the same family or to any unauthorised third party unless the data subject has given their explicit consent to this.

11.2 It is important to be aware that those seeking information sometimes use deception to gain access to it. Trustees must always verify the identity of the data subject and the legitimacy of a request for information, particularly before releasing information via telephone.

11.3 Personal Data may only be transmitted by fax or email if security procedures are in place e.g. encryption used in email.

11.4 Trustees should always double check that they have the correct email or postal address before sending out any Personal Data.

11.5 If a member of Trustees receives a request for Personal Data about another volunteer, (s)he should forward this to the Data Privacy Manager.

11.6 Trustees should ensure that any Personal Data that they use in the course of their work is kept securely. Paper records should be kept in locked storage, and devices such as computers and mobile phone should be encrypted.

11.7 If Trustees have any questions, they should contact the Data Privacy Manager.

This Policy may be amended or updated from time to time, and Trustees should therefore ensure that they consult the most up to date version.