



Cardiac Rehab Support West Sussex

supporting cardiac patients and their carers in the West Sussex area

CRSWS PRIVACY STATEMENT

1. **CARDIAC REHAB SUPPORT WEST SUSSEX [CRSWS]** is committed to safeguarding the privacy and personal details of all those who have indicated their wish to **STAY IN TOUCH**, [henceforth referred to as Supporters].
2. **The lawful basis** under which we hold your personal information [in accordance with current Data Protection legislation] is 'Legitimate Interests'.
3. **Collection and storage of personal information.** We only collect and store, in password-protected files or secure paper files,
 - Supporter's name,
 - Postal address,
 - Phone numbers,
 - Email address, and
 - Record of donations made.

These details originate from the **'STAY IN TOUCH'** form which you completed, as well as any paperwork sent to us with a donation. If donations are made under Gift Aid, we store individual Gift Aid Declarations [GAD] as required by HM Revenue & Customs [HMRC] whose Gift Aid returns require the names and addresses of donors. We also keep a copy of the forms we submit to HMRC. Any amendment to personal information should be communicated to our Trustee Data Controller, **LESLEY CZAJKOWSKI** (in writing, if possible) via info@cardiacrehabsupport.org.uk

4. If you provide us with other personal information, you must inform us if you wish that to be similarly stored.
5. If you provide us with personal details of any other person, you must obtain their express consent to us storing that information before we can make use of it.
6. **Personal information is held** by the Trustee Data Controller and the CRSWS Administrator. Personal information is held for as long as you wish to remain a Supporter. If you request us at any time to delete your personal information from our files, we will comply with your request in so far as we are allowed to do so by law.
7. **Charity law requires us to maintain adequate financial records.** This means that we will retain correspondence relating to donations and sponsorship for six years from the end of the current financial year. As such, any information you supply with any donation or sponsorship will be retained for this period. Similarly, financial information required to allow us to claim Gift Aid tax reclaims from HMRC will be also be held for six years from the end of the current financial year [as required by HMRC]. If you provide personal information relating to the purchase of any goods from us, such information will also be stored for the same period.
8. **We use your personal information** to communicate with you [usually twice a year] with newsletters and information about heart health and personal wellbeing. We do not share your information with any other organisations or persons (although members of the Board of Trustees will have access to your data, on a limited basis, when management need arises). If, in future, we enter into any contract with, for instance, a mailing service provider, we will ensure that their data protection policy is as tight as this policy.,
9. **If you wish to see what personal data we hold in your name**, please contact the Trustee Data Controller at info@cardiacrehabsupport.org.uk . There is no cost involved for you in making such a request.

Cardiac Rehab Support West Sussex is a registered Charity No. 1154903

Registered address: 27 The Avenue | Shoreham-by-Sea | West Sussex | BN43 5GJ

Email: info@cardiacrehabsupport.org.uk | **Web:** www.cardiacrehabsupport.org.uk



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10. **If we become aware of any loss or damage** to any personal information, we will communicate with all Supporters as soon as possible (usually by means of postal mail) and we will inform the Information Commissioner's Office.
11. We do **not** hold any data on anyone who is a child.
12. To support the **lawful basis** for our processing activity of 'Legitimate Interests', we keep under review the legitimate interests assessment which the Board of Trustees has approved.

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Legitimate Interests Assessment [LIA]

1. **Purposes** for holding personal data:
 - We need to record Supporters' applications (with donations).
 - We need to hold names, addresses, phone number and email addresses in order to send out newsletters and other appropriate material to those with heart and related conditions, or the carers of those with such conditions.
 - We need to keep Supporters' details up to date.
 - We need to record donations, send donors letters of receipt and record the sale of items and publications where these apply.
 - We need to claim Gift Aid on a person's donation(s) if a Gift Aid Declaration is signed
 - We need to hold name, role, phone number, organisation address and email address of organisations – or individuals – who have applied to the charity for a grant.
 - We need to maintain adequate financial records.

2. **Necessity** for holding personal data:
 - We need to be able to communicate with Supporters.
 - We need to record total Supporters' donations in a year (as distinct from other donations, legacies and income from sponsored events and other fund-raising exercises).
 - We need to be able to claim Gift Aid tax refunds and retain a copy of the Gift Aid forms we submit to HMRC.
 - We need to be able to communicate with organisations or individuals who have applied for a grant and to monitor the uses of any grant made.
 - We need to comply with the requirements for keeping financial records as set out in the Charities Act 2011.

3. **Balancing** of this charity's purposes and needs against the individual Supporter's rights and expectations:
 - Supporters will expect us to hold their names, addresses, telephone numbers and email addresses to communicate with them.
 - They will expect us to record their donations (and contact them if a regular donation does not arrive as expected – because of a Banking error, for example).
 - They will expect us to hold their information for at least 6 years (particularly for Gift Aid purposes).
 - We will remind them every two years of their right to have their personal details deleted at any time.
 - Organisations – or individuals – who have applied to the charity for a grant will expect us to hold their name, role, phone number, organisation address and email address in order to communicate with them and for the charity to monitor the uses made of any grant we agree.

This Privacy Statement and Legitimate Interest Assessment were approved by the CRSWS Trustee Board on 9 May 2018, was reviewed in April 2022 and will be reviewed again in April 2024.

All personal information given to Cardiac Rehab Support West Sussex [CRSWS] is only held and used in accordance with the Data Protection Act 1998. We do not share our mailing lists with other organisations. You can unsubscribe at any time by emailing info@cardiacrehabsupport.org.uk

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