Appleshaw Primary School PTA Gift Aid Privacy Policy

Policy owner: Appleshaw Primary School PTA Committee
Charity Name and Number: Appleshaw PTA 1154338
Approved by: PTA Committee
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1. Introduction. Appleshaw Primary School PTA is committed to protecting the privacy and personal information of parents, carers, donors, volunteers and supporters. This policy explains how the PTA collects, uses, stores and protects personal information provided in connection with Gift Aid donations and related fundraising activities. We will handle personal information fairly, lawfully, transparently and securely, in accordance with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018 and other applicable data protection legislation. This notice applies when you complete our Gift Aid information collection form, make an eligible donation, or otherwise provide personal information to the PTA for Gift Aid purposes.

2. Who is responsible for your information? Appleshaw Primary School PTA is responsible for the personal information collected and used for its Gift Aid administration, subject to confirmation of the charity's formal legal arrangements. The PTA Treasurer is responsible for overseeing the secure handling of Gift Aid information and maintaining appropriate records.

Contact details. For questions about this policy, your personal information or your data protection rights, please contact:

a. **Organisation:** Appleshaw Primary School PTA
b. **Contact:** PTA Treasurer
c. **Email:** GraemeCleave@hotmail.co.uk

The PTA is separate from the school for the purposes of its own charitable fundraising activities unless the relevant legal arrangements establish otherwise. Information will not automatically be shared with the school simply because the donation supports school activities.

3. What personal information do we collect? When you complete our Gift Aid Microsoft Form, we may collect the following information:

a. Your full name.
b. Your full home address, including postcode.
c. Details of your Gift Aid declaration and confirmation that you wish eligible donations to qualify for Gift Aid.
d. The date your declaration was made.

e. Details of relevant donations, including amounts and dates.
f. Records of any changes, corrections or cancellations to your declaration.
g. Other information strictly necessary to administer Gift Aid and meet our legal obligations.

We do not intend to collect children's personal information for the purposes of administering Gift Aid. Please provide only the information requested by the form. We will not ask for your National Insurance number, bank account details or copies of your tax returns for a standard Gift Aid declaration.

4. **Why do we collect your information?** We collect and use your personal information for the following purposes:

a. To establish whether your declaration meets HMRC's Gift Aid requirements.
b. To identify eligible donations and submit accurate Gift Aid claims to HMRC.
c. To maintain records demonstrating that declarations and claims are valid.
d. To contact you if we need to clarify or correct information relating to your declaration.
e. To respond to requests from HMRC or other competent authorities where legally required.
f. To meet our legal, financial, accounting and charitable governance obligations.

Gift Aid allows the PTA to reclaim eligible tax on donations, increasing the funds available to support pupils and school activities without increasing the donor's donation. Your information will not be used for unrelated marketing or fundraising communications unless we have an appropriate lawful basis to do so and, where required, your permission.

5. Our lawful basis for processing your information. The PTA will process personal information only where an appropriate lawful basis applies under data protection legislation. Depending on the activity, this may include:

a. **Legal obligation:** processing and retaining information where required to meet applicable tax, accounting and legal requirements.
b. **Legitimate interests:** administering charitable donations, maintaining accurate records, preventing errors and ensuring the proper management of Gift Aid claims, where these interests are not overridden by your rights and interests.

Your Gift Aid declaration is your confirmation that you wish eligible donations to be treated as Gift Aid donations. This is separate from the lawful basis used to process your personal information under data protection law. You may choose not to make a Gift Aid declaration. Doing so will not prevent you from donating or participating in PTA activities.

6. Who may access or receive your information? Your information will be accessible only to authorised people who need it to administer Gift Aid or meet the PTA's legal obligations. This may include:

a. Authorised PTA committee members, including the Treasurer.
b. HM Revenue & Customs (HMRC), when we submit Gift Aid claims or respond to lawful requests.
c. Our authorised professional advisers, auditors or other service providers where necessary.
d. Microsoft, as the provider of the online form platform, in accordance with the applicable service arrangements and data protection terms.

We will not sell your personal information or share it with third parties for their own marketing purposes. We will not routinely share your Gift Aid information with the school, other parents or unrelated organisations. Where a service provider processes information on our behalf, we will take appropriate steps to ensure that the information is handled securely and in accordance with applicable data protection requirements.

7. How do we store and protect your information? Gift Aid information may be collected through Microsoft Forms and stored or transferred to authorised PTA records for administration and record keeping. The PTA will take reasonable and appropriate measures to protect personal information against unauthorised access, accidental loss, alteration, disclosure or destruction. These measures include:

a. Restricting access to authorised individuals.
b. Using appropriate account security and access controls.
c. Storing electronic records in approved, access-controlled locations.
d. Avoiding unnecessary copying or circulation of donor information.
e. Ensuring that information is securely deleted or destroyed when it is no longer required.

The PTA will review the security of its information-handling arrangements periodically.

8. How long will we keep your information? We will retain personal information only for as long as necessary for the purposes described in this notice and to meet applicable legal and regulatory requirements. Gift Aid declarations and supporting records will be retained for the period required by HMRC, generally at least six years in accordance with the applicable record-keeping rules. Where a declaration covers multiple donations, the relevant retention period will be assessed by reference to the applicable requirements and the most recent donation covered. Records may need to be retained for longer if they relate to an ongoing HMRC enquiry, dispute or other legal obligation. Information that is no longer required will be securely deleted or destroyed.

9. Your data protection rights. Under data protection legislation, you may have the right to:

a. **Access:** request a copy of the personal information we hold about you.
b. **Rectification:** ask us to correct inaccurate or incomplete information.
c. **Erasure:** request deletion of your information where the legal conditions for erasure are met.
d. **Restriction:** ask us to restrict certain uses of your information in specified circumstances.
e. **Object:** object to processing based on legitimate interests, subject to applicable legal requirements.
f. **Data portability:** request certain information in a portable format where this right applies.
g. **Complain:** raise a concern with the Information Commissioner's Office (ICO).

These rights are subject to legal conditions and exceptions. For example, we may be required to retain Gift Aid records even if you ask us to delete them. To exercise your rights, please contact the PTA Treasurer using the contact details in Section 2. We may need to verify your identity before responding. You can find further information about your rights and how to raise a concern at: Information Commissioner's Office — ico.org.uk

10. **Changes to your Gift Aid declaration.** You may contact the PTA if your personal details change, if you wish to correct your information, or if you wish to cancel an ongoing Gift Aid declaration. Cancellation will not normally affect eligible donations already made and validly covered by the declaration, but we will not use a cancelled ongoing declaration to claim Gift Aid on subsequent donations. If you believe your tax circumstances mean that you are no longer eligible to cover the Gift Aid claimed on your donations, please contact the PTA and consult HMRC guidance.

11. Microsoft Forms and online collection. The PTA may use Microsoft Forms to collect Gift Aid declarations and the personal information needed to administer them. When using the form, you should read this privacy notice before submitting your information. The PTA will restrict access to form responses and any downloaded records to authorised individuals. Information will not be made publicly available. Microsoft's role in processing information will depend on the account and service arrangements used by the PTA or school. Appropriate access, retention and security settings will be checked before the form is used.

12. **Data breaches and concerns.** If the PTA becomes aware of a personal data breach, it will assess the incident promptly and take appropriate steps to contain and address it. Where required by law, the PTA will notify the ICO and affected individuals within the applicable timescales. If you have any concerns about how your information has been handled, please contact the PTA Treasurer in the first instance.

13. Policy review. The PTA Committee will review this policy at least annually and whenever there is a significant change to the PTA's data collection, Gift Aid processes, technology or legal obligations. The latest version will be made available on the Appleshaw Primary School website.

Related guidance:
HMRC — Gift Aid declarations
ICO — Information and guidance on data protection