

Rising Brook Lease at Stone Youth Centre, Stone

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1) Introduction

Rising Brook was granted a five year lease to run services out of the Stone Youth Centre in 2018 by the Staffordshire County Council. The past five years have seen many groups and individuals use the Centre for all sorts of community activities.

We would like to ask the Council for another lease to continue providing these services to the community. However due to building development work which needs to take place at the Centre and the financial investment relating to this we are asking the Council to grant us a 20 year lease under the same terms as our current lease. One of the reasons for this is as a charity we would be prohibited from investing charitable funds in a facility if we only had a short lease.

2) How the organisation is run

a) Who we are

Rising Brook is a group of churches in Staffordshire with a registered charity number 1136190 and company number 7122684. We are a not for profit organisation. An aspect of the Rising Brook model relates to how we use the Centres we operate out of. We currently have four locations and each location operates as a community centre for hospitality, local community bookings, platforms for community projects and places of safety for people to receive practical help and emotional support.

b) Governance

As an independent Charitable Company we have a Board of Trustees who are responsible for the governance of everything that happens through Rising Brook. The Trustees have delegated the running of the charity to a CEO who in turn has put together a Leadership Team and together they lead all the work. Each Centre has a Location Team under the leadership of their Centre Manager who are responsible for the day to day running of the Centre.

In addition to the Leadership Team, we have a centralised structure of roles which serve across all Centre locations providing expertise and continuity. These roles include Finance, Marketing & Production, Safeguarding, Facilities, IT, HR, Compliance etc. The structure accommodates planning, budget setting and management accountability.

c) Policies

We have the following policies which are approved by the Trustees and reviewed on a scheduled either every three years or every year depending on the policy. All policies are contained in a Staff and Volunteers Handbook.

The policies are:

- Code of Conduct
- Discrimination, Harassment & Bullying
- Equal Opportunities, Recruitment & Development
- Disciplinary Procedure
- Grievance Procedure
- Whistleblowing
- Right of Appeal
- Safeguarding
- Finance
- Data Protection
- Privacy
- Data Retention
- Health & Safety
- IT
- Social Media
- Annual Holidays
- Public Holidays
- Compassionate Leave
- Sick Pay
- Maternity, Paternity, Adoption & Parental Leave

If you would like to see all our policies these can be sent to you. For the purposes of this paper I have attached the following as an appendix. Whistleblowing, Safeguarding, Finance and Data Protection.

d) Vision and Objectives

Our vision is to see - thriving communities through individual growth

Our mission is to - work within communities to deliver services to reduce poverty and disadvantage, empowering people to meet their full potential so that everyone can thrive

Our values are -

- ❖ Dignity – A commitment to treat everybody with dignity and respect
- ❖ Accessibility – A commitment to provide services that are accessible, value diversity and are welcoming to all
- ❖ Integrity – A commitment to behave honestly, fairly and professionally

Objectives

1. To provide a range of community based services that:
 - Improve health and well-being
 - Reduce the negative effects of poverty
 - Reduce social isolation
 - Support families
2. To deliver services that give people dignity, provide hope and are delivered with kindness and compassion
3. To strengthen communities by increasing community participation and social responsibility, where all are made to feel valued and safe
4. To provide people with opportunities to build their skills, confidence, aspirations and resilience

Outcomes

- To reduce the adverse effects of poverty and unstable income
- To reduce social isolation
- To improve health and well-being
- To improve people's awareness of their rights and available options and how to access them
- To increase confidence, self-esteem and resilience
- To increase community participation and strengthen local communities

3) How the Centre is used

a) Groups using the Centre

Groups Highlighted in blue are activities that currently happen weekly in the Centre
Groups highlighted in yellow are activities that have happened in the Centre at least once over the last year

Groups not highlighted are activities that have happened in the Centre at some point in the past five years. Some have stopped due to no longer operating, others pulled out during the pandemic. Some may still come back.

We have included the list of groups and activities into the following categories:

- i) Children/Schools

- ii) Additional Needs group/disability support
- iii) Sports/Exercise
- iv) Various Groups
- v) Other Rising Brook Actives

i) Children/Schools

Little Massage Stafford Stoke Blacks juniors
 NCS (National Citizens Service) summer programme
 4-14 Before and After school club St Johns Ambulance (Junior Cadets)
 Prestige Performance Academy Private Children's birthday parties(20 per year)

St Dominics Year 6 leavers party

ii) Additional Needs group/disability support

Futures2gether Staffordshire Ventures
 S.T.I.N.G W.H.Y.C.H
 Very Special Children

iii) Sport/Exercise

Alleynes Vets Walking football/badminton Dave Fox 5 aside football
 North of the Yoga Yoga (Jane Boyd)
 Ladies netball Trentham Junior running club
 Staffordshire Sports and Performance Academy (Gymnastics)
 Pyramid sports Stone Dominoes football club
 Didi Rugby St Dominics Priory (sports day & PE lessons)
 St Dominics Primary (sports day & PE lessons)
 Christchurch first school (sports day & PE lessons)
 Elmhurst Pre-school (sports day)

iv) Other groups

Biz mums support group Expecting Antenatal classes
 Ukulele group (U3A) Rock Choir
 Paediatric first aid The Sycamore Players
 A Child of Mine Sunflower support group
 Private counselling Waterways Chaplains
 Stone District Swimming Club Stone Town Council
 Stone Master Marathoners Staffordshire Occupational Therapy
 Independent Christmas market

v) Other Rising Brook Activities

Sunday services and midweek meetings
 Create and Play toddler groups
 Breastfeeding support group Community Café/Warm Spaces
 Donation point for Stone Community Hub Food bank
 Open House (helping social isolation for the over 65's)
 Craft and Create Open Hands Deaf day event
 Renew Bible Study Summerfest Community event
 Easter Community Event Bethlehem Christmas Event
 Half term children's activities and art workshops
 Adult art workshops Wellbeing events

Stone Churches together celebration (Week of Christian Unity)

Community Christmas meal

Fundraising events - Quiz night

Table top sale

Charity Fashion Show

MacMillan Coffee Morning

b) Who is benefiting

As you will have read there are many groups using the Centre and benefiting from the facilities. Our weekly footfall is approximately 350 people per week from regular activities held at the Centre. On top of that at least a further 950 guests come through the Centre to one off events during the year

4) How the Centre is looked after

a) Maintenance

Within our annual budget we allocate funds for maintenance and small building development works. We employ a full time Head of Facilities who looks after all the Centres we operate ensuring these are well maintained.

b) Finance

As we are one Charitable Company we have one set of accounts covering all the Centre Locations we operate. This means a Centre which has a deficit in finance through the year is offset by a Centre with a surplus in our management accounts. Within our budgeting structure each Centre has an individual budget and the Centre Manager is responsible for the income and expenditure.

Monthly management accounts are scrutinised by the leadership team and quarterly accounts by the Trustees. Our accounts are examined annually by an independent examiner, a copy of which is part of this pack of papers. Please note these accounts are for the whole organisations of which the operation of the Centre at Stone is one part.

Our funding comes from three areas. Groups using the Centre pay a small fee to help cover utilities etc. We apply for grants for certain projects. We receive regular donations and one off gifts from the people involved in our church.

c) Future Development

There are significant areas which could do with investment in the coming years. A key problem which hampers use of the Centre is the lack of car parking. There is a section of the property which would lend itself to being turned into a car park without reducing space for activities.

The sports barn is a fantastic aspect of the Centre. However it has major problems with the type of construction it is in relation to the roof which creates incredible condensation, this

then drips onto the playing surface making it very slippery. Both the roof and the playing surface need investment. This would lead to greater use in the community.

The sports barn and car parking projects would have a combined six figure estimate to complete. We would be unable to fundraise for these projects without a long term lease.

We have enough regular funding at the Stone Centre to cover day to day costs including ongoing maintenance. We currently do not have the funding to invest in the development of the car park etc. however we have large pool of people we can present a capital fund raising project to and we are confident this would result in the needed funds to complete such a project.

Respectively Submitted

Gary Sloan
On Behalf of Rising Brook
May 2023

5) Policy Appendix

Policy Appendix 6

WHISTLEBLOWING

Review Date September 2024

We recognise that there may be times when a concern is:

- of such a serious nature and could be deemed illegal activity on the part of the company.
- relates to a Senior member such as a member of the Leadership Team, the Senior Minister, CEO, Trustee or Elder and you do not know where to go with your concern.

In such situations we expect these concerns to be raised. We also expect that you will be able to do this with confidence and in no way feel concerned or experience intimidation which would prevent you from doing so. An investigation will be carried out and appropriate action taken. You will be informed of the progress of the investigation and will be interviewed by the investigation team. At all stages of an investigation resulting from a concern raised, we will exercise confidentiality relating to the individual raising the concern and the individual an allegation has been made against. Confidentiality will remain with those investigating the concern. It should be noted that confidentiality for those involved does not mean anonymity for the individual raising the concern.

As a concern may also involve Statutory Bodies including the Police. Information will need to be supplied about all aspects of the concern including those raising it. Confidentiality will therefore extend to these Bodies and it should be noted that anonymity would be unlikely if the concern led to a case going to court.

Safeguarding

If the concern relates to safeguarding (see safeguarding policy **appendix 8**) you should:

- take this to the designated safeguarding person in your location who will inform either the designated Leads for Adults (Liz Dipple) or Children (Ruth Stephenson) depending on the issue, who will in turn contact the Designated Lead and develop a plan of action including contact with Statutory Bodies as appropriate.
- if the concern relates to the location safeguarding person you should contact immediately either the designated Leads for Adults or Children depending on the issue, who will in turn contact the Designated Lead and develop a plan of action including contact with Statutory Bodies as appropriate.
- if the concern relates to either of the designated Leads for Adults or Children you should immediately contact the Designated Lead for Safeguarding (Ali Summers), who will develop a plan of action including contact with Statutory Bodies as appropriate.
- if the concern relates to the Designated Lead you should take your concern to the Senior Minister or CEO, who will in turn contact the Designated Trustee for Safeguarding and develop a plan of action including contact with Statutory Bodies as appropriate.
- if none of the above is appropriate you should take your concern to Trustees who will consult with other Trustees and develop a plan of action including contact with Statutory Bodies as appropriate.
- if this is not appropriate you should take your concern to the Heart of England Baptist Association (HEBA).

Non Safeguarding

If your concern relates to another serious issue, outside of Safeguarding, you should:

- take this to a member of the Leadership Team who will take your concern to the Senior Minister or CEO, who will consult with others as appropriate and develop a plan of action including contact with Statutory Bodies as appropriate.
- if the concern relates to a member of the Leadership Team you should take this directly to the Senior Minister or CEO, who will take your concern to the Trustees and develop a plan of action including contact with Statutory Bodies as appropriate.
- if your concern relates to the Senior Minister or CEO you should take this to a Trustee who will consult with other Trustees and develop a plan of action including contact with Statutory Bodies as appropriate.
- if your concern relates to a Trustee you should take this to the Senior Minister or CEO who will develop a plan of action including contact with Statutory Bodies as appropriate.
- if it is not appropriate to take a concern about a Trustee to the Senior Minister or CEO then you should take your concern to the Heart of England Baptist Association (HEBA).

Policy Appendix 8

SAFEGUARDING

Review Date May 2024

Our vision

Is to see the transformation of people and places by faith expressing itself through love.

In fulfilling this vision, we:

- Welcome children and adults at risk into the life of our community
- Run activities and offer community outreach and provision for children and adults at risk

- Make our premises available to organisations working with children and adults at risk

Our safeguarding responsibilities:

We recognise our responsibilities in safeguarding all children, young people and adults at risk, regardless of gender, ethnicity or ability.

We commit ourselves to the nurturing, protection and safekeeping of all associated with us. In pursuit of this, we commit ourselves to this policy and to the development of sound procedures to ensure we implement our policy well.

All employees and volunteers should be aware of the principles set out below and all who are tasked with working with children, young people and vulnerable adults should have the relevant DBS, have undergone safeguarding training and have access to and full knowledge of the Safeguarding Manual.

Definitions:

For the purposes of this policy an ‘adult at risk’ or vulnerable adult is not simply an ‘adult with care and support needs’ but also :-

“a person aged 18 or over whose ability to protect himself or herself from violence, abuse, neglect or exploitation is significantly impaired through physical or mental disability or illness, old age, emotional fragility or distress, or otherwise; and for that purpose, the reference to being impaired is to being temporarily or indefinitely impaired.”

The definition of a child is taken from the Children's Act 1989 and 2004 respectively and is anyone who has not yet reached their 18th birthday (Working Together to Safeguard Children. London: Department for Education (DfE) “regardless of whether they live with their family or are over 16 and live independently, in further education, is a member of the armed forces, is in hospital or in custody in the secure estate for children and young people”

We are committed to

- **Prevention and reporting of abuse** - It is the duty of everyone to help prevent the abuse of children and adults at risk, and the duty of everyone to respond to concerns about the well-being of children and adults at risk. Any abuse disclosed, discovered or suspected will be reported in accordance with our procedures. We will fully co-operate with any statutory investigation into any suspected abuse linked with us.
- **Safer recruitment, support and supervision of workers** - We will exercise proper care in the selection and appointment of those working with children and adults at risk, whether paid or voluntary. All workers will be provided with appropriate training, support and supervision to promote the safekeeping of children and adults at risk.
- **Respecting children and adults at risk** - We will adopt a code of behaviour for all who are appointed to work with children and adults at risk so that all children and adults are shown the respect and personal dignity that is due to them.
- **Safer working practices** - We are committed to providing an environment that is as safe as possible for children and adults at risk and will adopt ways of working with them that promote their safety and well-being. We are committed to supporting all those affected by abuse.

- **A safer community** - We are committed to the prevention of bullying. We will seek to ensure that the behaviour of any individuals who may pose a risk to children, young people and adults at risk involved with our community are managed appropriately.
- We are committed to following all statutory guidelines in relation to safeguarding children and adults at risk and in implementing the requirements of the Disability Discrimination Acts 1995 and 2005 and all other relevant legislation including the Equality Act 2010.
- We will ensure that we are keeping up to date with national and local developments relating to safeguarding and in working in partnership with Thirtyone:eight; Staffordshire Safeguarding Children Board (SSCB); and the Staffordshire and Stoke-on-Trent Adult Safeguarding Partnership Board (SSASPB)

We recognise:

- Children's Social Services has lead responsibility for investigating all allegations or suspicions of abuse where there are concerns about a child. Adult Social Care has lead responsibility for investigating all allegations or suspicions of abuse where there are concerns about an adult with care and support needs.
- Where an allegation suggests that a criminal offence may have been committed then the police should be contacted as a matter of urgency.

Safeguarding is everyone's responsibility

We have appointed the following individuals:

Safeguarding Lead (Rising Brook & Signposts Services)

Ali Summers ali.summers@risingbrook.org 01785 214750

Designated Safeguarding Person for Children and Young People (Rising Brook & Signposts Services)

Ruth Stephenson ruth.stephenson@risingbrook.org 01785 214750

Designated Safeguarding Person for Adults at Risk (Rising Brook & Signposts Services)

Liz Dipple liz.dipple@risingbrook.org 01785 214750

Safeguarding Trustee (Rising Brook)

Margy Stephenson Margy.stephenson@risingbrook.org

Safeguarding Trustee (Signposts Services)

John Marshall john.marshall@signposts-services.org.uk

Regional Minister (Heart of England Baptist Association)

Adrian Argile aa@baptist-heartofengland.org 0121 4724986

Safeguarding Team Members

Tim Herriott tim.herriott@risingbrook.org

Dave Nicholas dave.nicholas@risingbrook.org

Hannah Fletcher Hannah.fletcher@risingbrook.org

British Sign Language Access Safeguarding Designated Person

Susan Myatt susan.myatt@risingbrook.org

EXTERNAL CONTACTS:

Due Diligence Checking (DDC)

www.ddc.uk.net

01162 603055

ThirtyOne:Eight (formerly CCPAS)

thirtyoneeight.org

0303 003 1111

Staffordshire Police

Call 101 and ask for MASH

(Multi Agency Safeguarding Hub)

Outside of MASH hours, report to the Area Communications Room

In an emergency, always call 999

Staffordshire County Council's**First Response Team**

www.staffordshire.gov.uk/reportconcern

Children: 0800 1313 126

Adults at Risk: 0345 604 2719

Monday – Thursday: 8:30am – 5:00pm

Friday: 8:30am - 4:30pm

Emergency out of hours: 0345 604 2886

Policy Appendix 9**FINANCE****Review Date February 2025**

We have a number of finance policies ensuring we are good stewards of the financial resources entrusted to us. Below are the most relevant for employees and volunteers. Additional policies and procedures are available on request from the Head of Finance. These include Approved Suppliers, Banking, Credit Hold Customers and Inter Departmental Transactions.

1. Financial Reporting and Budgeting

This section of our finance policy details the requirements surrounding financial reporting and budgeting. As a charity we are accountable to many for how we use our financial resources and therefore we need good systems in place.

Financial Reporting

- The leadership team will review the monthly management accounts, and take any actions required
- The finance and general purposes committee shall meet quarterly to discuss and examine the financial information, and prepare a report on this to the trustees
- The audited/independently examined accounts will be presented to the trustees for approval or otherwise within the timelines laid out by legislation
- The Head of Finance is responsible for ensuring the audited/independently examined accounts are submitted to Companies House, Charity Commission, and any other regulatory bodies within the legal deadlines for doing so.
- All budget holders will receive appropriate information to enable them to manage their budgets within the agreed parameters

- All budget holders are responsible for ensuring sufficient and appropriate information is passed to the Head of Finance to enable financial reporting deadlines to be met.

Budgets

- A full budget for the following calendar year shall be set by the leadership team and will reflect our agreed strategy for the year. The budget and strategy should be approved by the trustees before the end of the current calendar year.

2. Expenditure

This section details how expenditure is authorised and the information that is required to be retained and passed on to the Head of Finance. As a charity, managing money well that is given to be used for charitable purposes is important to us. This section reflects that.

Budget Holders

All areas of expenditure have a designated budget holder (or holders) that are approved by the Leadership Team. For each area of expenditure, it is only the budget holder(s) who can authorise expenditure.

In addition, it is the budget holder(s) who is accountable for ensuring expenditure remains within agreed budgeted parameters. There are various methods in which expenditure can occur, however in each case there must be authorisation.

3. Significant Expenditure

Where significant expenditure is incurred the quotes and conclusions need passing to the Head of Finance as per section 2. Expenditure.

4. Income

This section details the process for recording and reporting on income from various sources. It is each budget holders' responsibility to ensure that income received is appropriately coded when passed on to the Head of Finance.

Giving

The Head of Finance will inform leadership at least quarterly of changes in regularly giving, and ensure processes around thanking givers are in place.

5. Discounts, personal use of church resources

This section details the rules surrounding discounts and personal use of charity resources by employees and their family members. The purpose of writing this section is to address the complexity of staff members also being church members and to ensure that there is transparency and fairness to all parties.

Any tax implications that arise from not following this section will not be borne by the charity but will be the sole responsibility of the staff member/volunteer concerned.

In respect of this section, staff members are treated the same as church members. Therefore, when we allow church members a discount we also offer this to staff members, and when we charge church members we charge staff members at the same rate.

6. Non-budgeted expenditure

This section details the process for non-budgeted expenditure.

If expenditure is required, in excess of £2,000, that has not been budgeted, this must be approved by the senior minister and reported to the trustees.

Addendum:

Current practice/procedures in place (not included in policy above)

1. Financial Reporting and Budgeting

This section of our finance policy details the requirements surrounding financial reporting and budgeting. As a charity we are accountable to many for how we use our financial resources and therefore we need good systems in place.

Financial Reporting

- The Head of Finance shall present the leadership team with a monthly finance report covering financial performance against budget, state of charity reserves as well as any other financial information required
- The Head of Finance shall present other Budget holders with a quarterly finance report.

2. Expenditure

There are various methods in which expenditure can occur. These are detailed below:

- Supplier credit accounts

This is expenditure where we pay the suppliers invoice. Before passing to the Head of Finance for payment the budget holder needs to sign the invoice, plus include the budget expenditure code. Invoices should be approved and passed to the Head of Finance at the earliest opportunity so that payments can be processed before they fall due. Each budget holder needs to have a list of suppliers that their budget typically uses and for that list to be available to be available to their line manager in case of emergency. The Head of Finance and leadership team reserve the right, in exceptional circumstances, to suspend use of a supplier and will inform all budget holders when this is the case.

- Card transactions

Business charge cards are available to all budget holders to facilitate their activity more efficiently. It is the cardholders' responsibility to keep adequate records so that they are able to send a summary to the Head of Finance for the calendar month, showing budget codes, appropriate authorisation, and attachment of receipts

- Expenses

Where expenditure is incurred personally for reimbursement please ensure authorisation from the budget holder is obtained before making said expenditure. Expenses must be claimed within 3 months of being incurred and passed to the Head of Finance with receipts attached, signed by the employee or volunteer, and coded and initialled by the appropriate budget holder. Approved expenses claims will be paid within 14 days of being received by the Head of Finance.

- Cash expenditure

Sometimes for ease of activity, teams and departments may have a cash float and use this for some expenditure. It is the cash float holders' responsibility to keep adequate records by maintaining a monthly summary cash sheet with receipts attached. Summary cash sheets and receipts must be passed to the Head of Finance monthly or quarterly as agreed. If a cash float needs topping up, please make a request to the Head of Finance at least 14 days before the cash is required.

- Personal expenditure

Business charge cards, supplier accounts and cash floats are in place to enable charity expenditure to happen efficiently and effectively. They are not to be used for personal expenditure. Where any staff

member does use charity finances, in error, for personal expenditure, this needs to be notified to the Head of Finance and reimbursed immediately.

Failure to notify and reimburse immediately will result in the Head of Finance reporting this non-notification to the appropriate Divisional Leader or Department Head. Additionally, as personal expenditure is explicitly not authorised, any tax implications of such behaviour will not be borne by the charity but will be the sole responsibility of the employee or volunteer concerned.

3. Significant Expenditure

We expect all budget holders to spend their budgets wisely, using reputable suppliers and getting value for money. There are occasions though where the level of expenditure is such that budget holders need to document this in more detail. Where expenditure is required at a level of over £2,500 it is necessary for the budget holder to get 3 quotes.

The normal expectation is that we will go with the lowest quote. If there is good reason to choose one of the alternatives this must be clearly documented by the budget holder. The quotes and conclusions need passing to the Head of Finance when the actual expenditure is passed for payment.

4. Income

There are various routes for which income is received, the processes for each are as follows:

- Cash

It is each staff members' responsibility to ensure that monies received are kept securely within our locations and passed on to the Head of Finance, counted and coded, monthly or at the first practicable opportunity if the amount in excess of £100. Prior to passing to Head of Finance, all cash must be counted and coded, and summary sheet signed, by 2 members of the department concerned. Cash is not to be kept off-site overnight. The Head of Finance is responsible for ensuring all cash banked is clearly reconciled to attached cash sheets.

- Card

Where monies are received via card machine, summaries and receipts are to be kept securely within our locations and passed on to the Head of Finance, counted and coded, weekly or monthly as agreed.

- Churchsuite

Where income is received via ticketing on churchsuite it is the budget holders' responsibility to ensure the Head of Finance is informed before ticketing is set-up. It is the budget holders responsibility to manage and chase for outstanding payments.

- Invoicing

Where income is received via invoicing, it is the budget holders' responsibility to prepare and send invoices in a timely fashion, and to send copies and budget codes to the Head of Finance. The Head of Finance will liaise with budget holders' when invoices are overdue for payment, and reserves the right to discuss with Leadership team the need for further action such as putting customer on hold, taking more formal action to recover the debt.

- Gifts

The Head of Finance is responsible for keeping adequate records of gifts received so that we are operating within current legislation, able to thank givers systematically, provide appropriate pastoral care where giving changes, and demonstrate that any restricted gifts are used within the terms of the restriction. The Head of Finance and the leadership team reserve the right to return any gifts if they cannot be used in line with the wishes of the donor, or if there are concerns about the source of the gift.

5. Discounts, personal use of charity resources

The following are current potential discounts/personal use of charity resources

- Charges

Where we charge church members (i.e. Room hire for children's parties, minibus usage) we charge staff members at the same rate. Therefore, there are no discounts available for staff members that, have not also been offered, to church members (except staff drinks below). In addition, any department who offers a discount to a staff member has to make the same discount available to all church members.

- Staff drinks

Staff members are entitled to free drinks whilst they are working and for their guests at any work meetings.

- Café and catering

All food ordered by staff from café is charged at the same rate as for any other customer. Where café makes free food available, (eg. Because it will be thrown away otherwise), this will be communicated by the café manager to all staff. Where a budget holder is using café to cater for a meeting it is the joint responsibility of the café manager and said budget holder to ensure that if a payment is being allocated to a budget that this is properly recorded and passed onto the Head of Finance.

- Volunteers

Where budget holders are using budgets to gift their volunteers, it is their responsibility to record this information and communicate it to the Head of Finance so that all implications of the gift are accounted for. If the Head of Finance raises any tax/legal concerns of such gifts it is the responsibility of the budget holder to ensure these gifts fall within the parameters of the appropriate legislation.

6. Non-budgeted expenditure

This section details the process for non-budgeted expenditure.

In passing onto the Head of Finance for processing the processes within sections 2. and 3. must also be followed.

Policy Appendix 10

DATA PROTECTION (GDPR)

Review Date May 2024

We Commit to follow the Data Protection principles laid out below.

Introduction

We need to gather and use certain information about individuals. These can include members, attendees, church/business contacts, employees and other people the organisation has a relationship with or may need to contact.

This policy describes how this personal data must be collected, handled and stored to meet the organisation's data protection standards—and to comply with the law.

Why this policy exists

This data protection policy ensures we:

- Comply with data protection law and follows good practice
- Protect the rights of staff, members and contacts

- Are open about how we store and process individuals' data
- Protect ourselves from the risks of a data breach

Data Protection Law

The Data Protection Act describes how organisations must collect, handle and store personal information.

These rules apply regardless of whether data is stored electronically, on paper or on other materials. To comply with the law, personal information must be collected and used fairly, stored safely and not disclosed unlawfully.

The Data Protection Act is underpinned by eight important principles. These say that personal data must:

1. Be processed fairly and lawfully
2. Be obtained only for specific, lawful purposes
3. Be adequate, relevant and not excessive
4. Be kept accurate and kept up to date
5. Not be held for any longer than necessary
6. Processed in accordance with the rights of data subjects
7. Be protected in appropriate ways
8. Not be transferred outside the UK, unless that country of territory also ensures an adequate level of protection

Data Controller

In terms of the Data Protection Act 2018 we are the Data Controller, and as such determine what purposes personal information will be used for.

Policy Scope

This policy applies to all data we hold relating to identifiable individuals, even if that information technically falls outside of the Data Protection Act 2018. This can include:

- Names of individuals
- Postal addresses
- Email addresses
- Telephone numbers
- Plus any other information relating to individuals

Purpose of data held

Data may be held by us for the following purposes:

- Staff and volunteer administration
- Fundraising
- Realising the Objectives of the Charitable Organisation
- Legal and compliance
- Marketing and communications
- Supporting and strengthening the church community

Data Protection Risks

This policy helps protect us from some very real data security risks, including:

- **Breaches of confidentiality.** For instance, information being given out inappropriately.
- **Failing to offer choice.** For instance, all individuals should be free to choose how the organisation uses data relating to them.
- **Reputational damage.** For instance, the organisation could suffer if hackers successfully gained access to sensitive data.

Responsibilities

Everyone who works or volunteers for or with us has some responsibility for ensuring data is collected, stored and handled appropriately.

Everyone that handles personal data must ensure that it is handled and processed in line with this policy and data protection principles.

However, these people have key areas of responsibility:

- The **Trustees** are ultimately responsible for ensuring that we meet our legal obligations.
- The **Data Protection Officer** is responsible for:
 - Keeping the board updated about data protection and responsibilities, risks and issues.
 - Reviewing all data protection procedures.
 - Handling data protection questions from staff and anyone else covered by this policy.
 - Dealing with requests from individuals to see the data held about them (also called 'subject access requests').
 - Ensuring all systems, services and equipment used for storing data meet acceptable security standards. Evaluating any third-party services the organisation is considering using to store or process data. For instance, cloud computing services.
- The **Head of Marketing and Production** is responsible for:
 - Where necessary, working with other staff and volunteers to ensure marketing initiatives abide by data protection principles.

General staff and volunteer guidelines

- The only people able to access data covered by this policy should be those who **need it for their work or volunteer role**.
- Data **should not be shared informally**. When access to confidential information is required, employees can request it from their line managers.
- Employees should keep all data secure, by taking sensible precautions and following the guidelines below.
- Personal data **should not be disclosed** to unauthorised people, either within the organisation or externally.
- Data should be **regularly reviewed and** if it is found to be out of date, it should be **updated**. If no longer required, it should be deleted and disposed of.
- Employees and volunteers **should not save copies of personal data to their own computers**. Always access and update the central copy of any data.

Application of Guidelines

- We will minimise / eradicate where possible the number of places that personal information is stored. IT Policy outlines process around this issue.
- The number of people with access to our database should be limited to essential users only. If people are not regular users / have never logged on, their access should be deleted until requested again and evaluated for need of access.
- Annual checks should take place by all staff to ensure a regular review of data held is accurate, relevant and not excessive. Unnecessary data must be destroyed appropriately and securely.
- Access to information and how to ensure security is covered in the IT Policy.

Data Storage

When data is stored on paper, it should be kept in a secure place where unauthorised people cannot see it.

These guidelines also apply to data that is usually stored electronically but has been printed out for some reason:

- When not required, the paper or files should be kept **in a locked drawer or filing cabinet**.
- Employees should make sure paper and printouts are **not left where unauthorised people could see them**, like a printer.
- **Data printouts should be shredded** and disposed of securely when no longer required.

- When data is stored electronically, it must be protected from unauthorised access, accidental deletion and malicious hacking attempts: All staff and volunteers are required to abide by the IT Policy.

Subject Access Requests

All individuals who are the subject of personal data held are entitled to:

- Ask what information the company holds about them and why.
- Ask how to gain access to it.
- Be informed how to keep it up to date.
- Be informed how the organisation is meeting its data protection obligations.

If someone contacts the organisation requesting this information, this is called a subject access request. Subject access requests from individuals should be made by email.

Disclosing data for other reasons

In certain circumstances, the Data Protection Act allows personal data to be disclosed to law enforcement agencies without the consent of the data subject.

Under these circumstances we will disclose requested data. However, the Data Protection Officer will ensure the request is legitimate, seeking assistance from the Head of Compliance and from the organisation's legal advisers where necessary.

Providing information

We aim to ensure that individuals are aware that their data is being processed, and that they understand:

- How the data is being used
- How to exercise their rights

To these ends, the organisation has a Privacy Policy, setting out how data relating to individuals is used by the organisation.