

## **Fundraising**

### **Information collection**

#### **Information you give us.**

When you engage with our social media or message boards, make a donation to us, register for an event, or attend one of our events we will ask for your personal information to register you, for instance, your name, email address, telephone number and store this information to your account.

#### **Information from third parties.**

We may also receive your personal information from third parties you interact with that are associated with us, for instance, JustGiving, Virgin Money Giving, and Unity Lottery. Your personal information will then be added to your account.

#### **Your debit and credit card information**

If you use your credit or debit card to donate to us, buy something or pay for a registration at an event, online or over the phone, we will ensure that this is done securely and in accordance with the Payment Card Industry Security Standard (PCI DSS). You can find out more information on their website: [https://www.pcisecuritystandards.org/security\\_standards/index.php](https://www.pcisecuritystandards.org/security_standards/index.php)

We do not store your credit or debit card details at all, following the completion of your transaction. All card details and validation codes are securely destroyed once the payment or donation has been processed. Only staff authorised and trained to process payments will be able to see your card details.

If we receive an email containing any credit or debit card details, it will be immediately deleted, no payment will be taken and you will be notified. Donations should be completed through our JustGiving page via our donation page on our website, or via telephone or post.

<http://www.percyhedley.org.uk/make-a-donation/>

### **How we will use your information**

#### **The categories of donor information that we collect, hold, and share include:**

- Personal information (such as name, email and address)
- Characteristics (such as age and lifestyle e.g. events and interests)

We will use this information to process to set up and manage your account.

#### **For instance:**

- to enable us to communicate with you and to fulfil your request for information or services appropriate to your needs to monitor and improve our performance in responding to your request
- to process financial transactions
- to plan and coordinate events
- to market to you (where appropriate)
- to ensure we meet any legal obligations

### **Legal basis for our processing**

As the data controller when we collect your personal information, we will make sure this is only done in accordance with an appropriate legal basis. This means we will never process your information without a legal basis to do so.

One of these is where we have obtained your **consent** (*Article 6 (a) GDPR*) to use your information for specified notified purpose, such as to send you email/text marketing or to provide you with a product, service or information at your request.

Your consent will be gained via our consent form, which can be accessed via our keeping in touch page on our website: <http://www.percyhedley.org.uk/support-us/keep-in-touch/>

Another is where we have a **legal obligation** (*Article 6 (c) GDPR*) to disclose information about you, for instance, where a court or regulatory authority orders us, or where we are legally required to hold donor transaction details for Gift Aid, or accounting/tax purposes.

In certain instances, we may collect and use personal information where this is necessary in our **legitimate interest** (*Article 6 (f) GDPR*) as a charity, this includes being able to:

- send direct marketing to our supporters by post or contacting you by telephone for fundraising purposes (subject to checking against the Telephone Preference Service (TPS) and existing marketing preferences). See more at Marketing Preferences below;
- conduct research to better understand who our supporters are and better target our fundraising activity. See more at Fundraising below;
- monitor who we deal with to protect our charity against fraud, money laundering and other risks; and
- maintain and administer our donor accounts and systems.

In all cases, we balance our legitimate interests against your rights as an individual and make sure we only use your personal information in a way or for a purpose that you would reasonably expect in accordance with this Privacy Notice and that does not intrude on your privacy or previously expressed marketing preferences.

We do not currently process any **special category** data for our donors, however, if we ever do we will only do so in accordance with one of the additional lawful grounds for processing, such as where we have your explicit consent or you have made that information manifestly public. When we do this, we will tell you what special category information we are collecting and why.

## Images

During our events, it is likely you will be videoed or photographed. While it is not illegal to take photographs or video footage in public areas, we will never do so without your **verbal consent** (individuals or smaller groups) and advising you the purpose, for instance, to publish the event on our website, or newsletter etc.

When dealing with a larger audience we will inform you usually within an introduction, advising you the purpose and give all individuals the opportunity to make themselves known if they wish not to be included.

## Marketing materials

We want to ensure you receive the level of information about The Percy Hedley Foundation (PHF) that is right for you.

### Email/text marketing:

If you consent to marketing via our consent form and actively provide your email and/or mobile telephone number, we may contact you for marketing purposes by email or text message. By subscribing to PHF or opting in to email communications from PHF, you grant us the right to use the email for both email marketing purposes and advertising targeting.

### **Post/telephone marketing:**

If you have provided us with your postal address or telephone number we may send you direct mail or telephone you about our work, unless you have told us that you would prefer not to receive such information. We also actively check telephone numbers against the TPS and will only make telephone calls to you where your telephone number is listed on the TPS if you have specifically told us that you do not object to such calls and have consented to receive them via our consent form.

### **Your choice**

It is always your choice as to whether you want to receive information about our work, how we raise funds and the ways you can get involved.

You may **opt-out** of any marketing communications at any time by clicking the '**unsubscribe**' link at the end of our marketing emails.

You can also change any of your contact preferences at any time (including telling us that you don't want us to contact you for marketing purposes by telephone, or post) by contacting our **Fundraising Team on 0191 281 5821**, or **The Fundraising Team, The Percy Hedley Foundation, Hedleys Northern Counties School, Tankerville Terrace, Jesmond, Newcastle upon Tyne, NE2 3BB**.

We will not use your personal information for marketing purposes if you have indicated that you do not wish to be contacted by us for such purposes. However, for legal and tax purposes we will not be able to delete your information; therefore, we will retain your details on a suppression list to help ensure that we do not continue to contact you.

### **Fundraising**

We may at times carry out targeted marketing activities to ensure that we are contacting you with the most appropriate communication, which is relevant and timely and will ultimately provide an improved experience for you.

Currently we do **not** use any profiling techniques, use third party wealth screening companies, or insight companies to assist us with our marketing activities.

### **Under 18's**

We are committed to protecting the privacy of the young people that engage with us via our website, and at our events.

If you are under 18 and would like to get involved, please ensure that you have consent from a parent or guardian before giving us your personal information. When we personally collect information about a child or young person aged under 18 we will make it very clear as to the reasons for collecting this information and how it will be used.

### **Recipients and disclosing your personal information**

Where appropriate, we will share some of your personal information internally between relevant departments, and within the Foundation, for instance, with our Finance team.

We may also disclose your personal information external to the Foundation in the following circumstances:

- To third parties who process your personal information on our behalf, for instance, organisations whose external systems we may use for marketing purposes. These include;

- MailChimp <https://mailchimp.com/>
- With third parties who jointly process your information, for instance, organisations you have a vested interest in your charitable donations. These include;
  - JustGiving <https://www.justgiving.com>
  - Virgin Money Giving <https://uk.virginmoneygiving.com/giving/>
  - HM Revenue & Customs (HMRC) <https://www.gov.uk/donations-to-charity/gift-aid>
  - Unity Lottery <http://www.sterlinglotteries.co.uk/>
- Where we are under a duty to disclose your personal information in order to;
  - comply with any legal obligation (for example to a government body, law enforcement agency), or
  - in order to enforce or apply our rights (including in relation to our website or other applicable terms and conditions), or
  - in order to protect our organisation, (for example in cases of suspected fraud or defamation), or
  - in order to protect your vital interest or the vital interests of another individual (for example in cases of abuse or suspected abuse).

We can assure you, we require third parties we contract with to comply with data protection laws and have appropriate controls in place.

### **Data collection requirements**

In relation to Unity Lottery, we have a mandatory requirement to submit quarterly Lottery Returns to North Tyneside Council, with whom we hold our lottery license. The lottery returns list the date of each lottery draw and income received from this draw, but do not disclose and personal information relating to the participants of the draw.

In relation to HM Revenue & Customs, we have a legal obligation to submit a Gift Aid claim every year to reclaim tax on donations made by UK taxpayers in the previous 12 months. This claim will include the following information about the donor: title, first name (or first initial) and last name, house name or number, postcode, aggregated donations (if applicable), sponsored events, donation date or latest donation date in a series of donations made by the donor, and donation amount.

### **Keeping your personal information**

We keep your personal information only for as long as required to operate the service in accordance with a legal, regulatory, or specific business purposes. Where your information is no longer required, we will ensure it is disposed of in a secure manner.

Any information that we are required to retain for archive purposes will be held securely, with limited access rights and this information will not be further processed.

### **Our retention period for donor records:**

We will retain your donor record for 2 years from the last contact/donation/activity.

### **Our retention period for financial records:**

We will retain any financial information will be held for 6 years from the transaction date, in line with our legal obligations

**Our retention period for donor images:**

Images of our donors will usually be taken at large scale events, for instance the Great North Run, or similar. We have made a business decision to preserve our history and heritage by retaining some archive materials permanently, which may include the images of donors at such events.

(If you have a video or photograph taken that you originally gave consent for, and you change your mind, please contact us using the contact information provided).

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<sup>i</sup> *Processing of personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, or trade union membership, and the processing of generic data, biometric data for the purposes of uniquely identifying a natural person, data concerning health or data concerning a natural person's sex life or sexual orientation (Article 9 Processing of special categories of personal data)*