

The Caerlow Trust - Privacy Notice

This notice was last updated in November 2024

1. Introduction

Welcome to the Caerlow Trust privacy notice.

We are The Caerlow Trust (the '**Trust**') a charitable company limited by guarantee registered in England & Wales under Company Registration Number 14615179. The Trust's registered office address is at 5 New St Square, London EC4A 3TW.

This privacy notice informs you as to how we collect and use your personal data, what your privacy rights are and how the law protects you in respect of when we are collecting and using your personal data.

The Trust is registered as a Data Controller with the Information Commissioner's Office (registration number ZB548525). A Data Controller is an individual or organisation that determines the purposes and means of processing personal data.

The Trust respects your privacy and is committed to protecting your personal data. We strive to ensure that we are clear about how we will use the personal data that we collect. We process personal data in accordance with the UK General Data Protection Regulation (GDPR), Data Protection Act 2018, Privacy and Electronic Communications Regulations 2003 (as amended) and other applicable laws that regulate protection and privacy of your personal data, each as amended from time to time (the '**data protection laws**').

2. Purpose of this privacy notice

This privacy notice aims to give you information on how the Trust collects and processes your personal data in connection with the purposes outlined in paragraph 5 below, including any data you may provide where you sign up to a mailing list from the Trust.

It is important that you read this privacy notice together with any other privacy notices or fair processing notices we may provide on specific occasions when we are collecting or processing personal data about you so that you are fully aware of how and why we are using your personal data. This privacy notice supplements other notices and privacy policies and is not intended to override them.

3. How to contact us

If you have any questions about this privacy notice or our privacy practices, please contact us via email at enquiries@thecaerlowtrust.org

You have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK regulator for data protection issues (www.ico.org.uk). We would, however, appreciate the chance to deal with your concerns before you approach the ICO, so please contact us in the first instance.

4. Change to this privacy notice

We keep our privacy notice under regular review and it may be updated from time to time. Historic versions of this privacy notice can be obtained by contacting us.

It is important that the personal data we hold about you is accurate and current. Please keep us informed if your personal data changes during your relationship with us.

5. **What we use your personal data for**

We collect personal data about you through your relationship and communications with the Trust, for example, in respect of the management and administration of the Trust and its trustees or when you email us regarding a grant application.

We may also use your personal data for the following purposes:

- (a) to assess any grant application submitted to us;
- (b) to administer the provision of a grant;
- (c) to contact you regarding an application or the administration of a grant;
- (d) to maintain records of our activities;
- (e) to enforce and/or defend any of our legal claims or rights; and/or
- (f) for any other purpose required by applicable law, regulation, the order of any court or regulatory authority.

6. **The data we collect about you**

Personal data, or personal information, means any information about an individual from which that person can be identified. It does not include data where the identity has been removed (anonymous data).

We may collect, use, store and transfer different kinds of personal data about you which we have grouped together as follows:

- **Identity Data** includes your name, title, date of birth and gender.
- **Contact Data** includes your email address, postal address and telephone numbers.
- **Profile Data** includes your user data in relation to your interests, preferences and feedback.
- **Marketing and Communications Data** includes your preferences in receiving marketing from us and your communication preferences.

We also collect, use and share **Aggregated Data** such as statistical or demographic data for any purpose. Aggregated Data could be derived from your personal data but is not considered personal data in law as this data will **not** directly or indirectly reveal your identity. However, if we combine or connect Aggregated Data with your personal data so that it can directly or indirectly identify you, we treat the combined data as personal data which will be used in accordance with this privacy notice.

We do not collect any **Special Categories of Personal Data** about you (this includes details about your race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, trade union membership, information about your health, and genetic and biometric data). We do not collect any information about criminal convictions and offences.

Please note that where we need to collect personal data from you (either as required by law or to enable us to provide a service to you) and you fail to provide such data when requested, we may not be able to provide such services to you, but we will always notify you first if this is the case.

7. How we collect your personal data

We use different methods to collect data from and about you including:

Method	Type(s) of personal data	Examples of data collection
Direct interactions with the Trust	Identity Data Contact Data Profile Data Marketing and Communications Data	Processing grant applications Administering the provision of a grant Subscribing to receive marketing communications. Give us feedback or otherwise contacting us.
Third party partners	Identity Data	Providers of technical services in connection to the purposes that the Trust uses your personal data, such as AML/KYC service providers or IT service providers.
Third party legal and regulatory authorities	Identity Data Contact Data Profile Data Marketing and Communications Data	Defending or enforcing any of the Trust's legal claims or rights. The Trust's compliance with applicable law or regulations.

8. How we use your personal data

We will only use your personal data when the applicable data protection laws allows us to. Most commonly, we will use your personal data in the following circumstances:

- Where we need to perform the contract we are about to enter into or have entered into with you.
- Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests.
- Where you have given your consent for us to use your personal data in this way. Where applicable, please note that you have the right to withdraw consent to marketing communications at any time by contacting us.
- Where we need to comply with a legal obligation.

Purposes for which we will use your personal data

Set out below is a description of all the ways we plan to use your personal data, and which of the legal bases we rely on to do so.

We may process your personal data for more than one lawful ground depending on the specific purpose for which we are using your data. Please contact us if you need details about the specific legal ground we are relying on to process your personal data where more than one ground has been set out in the table below.

Purpose/Activity	Type of data	Lawful basis for processing including basis of legitimate interest
Register you as a trustee of the Trust The management and administration of the Trust, including the Trust's record keeping.	(a) Identity Data (b) Contact Data	(a) Performance of a contract with you (b) Necessary for our legitimate interests
To process grant applications, the administration of grants and managing the provision of grants	(a) Identity Data (b) Contact Data (c) Profile Data (d) Marketing and Communications Data	(a) Performance of a contract with you (b) Necessary for our legitimate interests
To manage our relationship with you which will include: (a) Notifying you about changes to our terms and conditions or privacy notice (b) Asking you to give feedback (c) To make recommendations to you about grants and services the Trust offers that may be of interest to you.	(a) Identity Data (b) Contact Data (c) Profile Data (d) Marketing and Communications Data	(a) Performance of a contract with you (b) Necessary to comply with a legal obligation (c) Necessary for our legitimate interests

Opting out of marketing communications

Where applicable, you can ask us to stop sending you marketing messages at any time by: (i) by following the opt-out links on any marketing message sent to you; or (ii) by contacting us at any time.

Where you opt out of receiving these marketing messages, this will not apply to personal data provided to us as a result of any services you have received from the Trust, or communications relating to service experience.

Change of purpose

We will only use your personal data for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose. If you wish to get an explanation as to how the processing for the new purpose is compatible with the original purpose, please contact us.

If we need to use your personal data for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

9. Disclosures of your personal data

Other than as expressly set out in this privacy notice or as otherwise permitted under applicable data protection law, we will not share, sell or distribute any of the personal data you provide to us without your consent.

We may share your personal data with third parties under this privacy notice, for the purposes set out in the table above, in the following circumstances:

- to our service providers, who handle that data on our behalf and in accordance with our instructions under contract (called "data processors"). These include IT suppliers, third party data analysis providers and agencies we use to conduct fraud and due diligence checks; or
- where disclosure is necessary to enable us to enforce our legal rights, or to protect the rights, property or safety of our employees or where such disclosure may be required by law (including without limitation to any legal adviser, court, regulator or other relevant authority).

We require all third parties to respect the security of your personal data and to treat it in accordance with the law. Unless you have otherwise consented to such use, we do not allow our third-party service providers to use your personal data for their own purposes and we otherwise only permit them to process your personal data for specified purposes and in accordance with our instructions.

We or the third parties mentioned above occasionally also share personal data with:

- our and their external auditors, e.g. in relation to the audit of our or their accounts, in which case the recipient of the information will be bound by confidentiality obligations;
- our and their professional advisors (such as lawyers and other advisors), in which case the recipient of the information will be bound by confidentiality obligations; and
- law enforcement agencies, courts, tribunals and regulatory bodies to comply with our legal and regulatory obligations.

10. International data transfers

The personal data that we collect from you will not be transferred or stored outside the United Kingdom and/or countries of the European Economic Area.

11. Data security

We employ appropriate technological and operational security measures to protect personal data we hold against any unauthorised access, any unlawful processing or loss. We have procedures in place to deal with any suspected personal data breach and we will notify you and any applicable data privacy regulator of a personal data breach where we are required to do so under applicable data protection laws.

Data transmission over the internet is not 100% secure, and although we employ appropriate technological and organisational security measures to protect your data from unauthorised access we cannot guarantee the security of any data sent over the internet or by public communications services.

12. Data retention

We will only retain your personal data for as long as is reasonably necessary to fulfil the purposes we collected it for. This includes for the purposes of satisfying any legal, regulatory, tax, accounting or reporting requirements. We may retain your personal data for a longer period in the event of a complaint or if we reasonably believe there is a prospect of litigation in respect to our relationship with you.

Personal data that we no longer need to hold is securely disposed of and/or anonymised, so you can no longer be identified from it.

In some circumstances we will anonymise your personal data (so that it can no longer be associated with you) for research or statistical purposes, in which case we may use this information indefinitely without further notice to you.

13. Your legal rights

Under certain circumstances, you have rights under applicable data protection laws in relation to your personal data. If you wish to exercise any of these rights please contact us.

You will not normally have to pay a fee to access your personal data (or to exercise any of the other rights). However, we may charge a reasonable fee (or refuse to comply with your request) if your request is clearly unfounded, repetitive or excessive.

We may need to request specific information from you to help us confirm your identity and ensure your right to access your personal data (or to exercise any of your other rights). This is a security measure to ensure that personal data is not disclosed to any person who has no right to receive it. We may also contact you to ask you for further information in relation to your request to speed up our response.

We try to respond to all legitimate requests within one month. Occasionally it could take us longer than a month if your request is particularly complex or you have made a number of requests, in which case we will keep you updated regarding these timings.

Data subject rights:

Request access to your personal data (commonly known as a "data subject access request"). This enables you to receive a copy of the personal data we hold about you and to check that we are lawfully processing it.

Request correction of the personal data that we hold about you. This enables you to have any incomplete or inaccurate data we hold about you corrected, though we may need to verify the accuracy of the new data you provide to us.

Request erasure of your personal data. This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have successfully exercised your right to object to processing (see below), where we may have processed your information unlawfully or where we are required to erase your personal data to comply with local law.

Object to processing of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground as you feel it impacts on your fundamental rights and freedoms. You also have the right to object where we are processing your personal data for direct marketing purposes. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information which override your rights and freedoms.

Request restriction of processing of your personal data. This enables you to ask us to suspend the processing of your personal data if: (i) you want us to establish the accuracy of personal data; (ii) where our use of your personal data is unlawful but you do not want us to erase it; (iii) where you need us to hold the personal data even if we no longer require it, as you need it to establish, exercise or defend legal claims; or

(iv) you have objected to our use of your personal data but we need to verify whether we have overriding legitimate grounds to use it.

Request the transfer of your personal data to you or to a third party. We will provide to you, or a third party you have chosen, your personal data in a structured, commonly used, machine-readable format. Note that this right only applies to automated information which you initially provided consent for us to use or where we used the information to perform a contract with you.

Withdraw consent at any time where we are relying on consent to process your personal data. However, this will not affect the lawfulness of any processing carried out before you withdraw your consent. If you withdraw your consent, we may not be able to provide certain products or services to you. We will advise you if this is the case at the time you withdraw your consent.