



Foundation
Derbyshire



Data

Retention Policy.

Last Updated Feb 2022.



Grant Applicants.

Our Trustees note that the Foundation has an identified Legitimate Interest, which is the lawful basis for processing data about our Grants Applicants and Referees.

Our grant-making is our core charitable activity and our use of accumulated data-based knowledge is key to our ability to work effectively and carry out the due diligence needed to safeguard the assets and reputation of Foundation Derbyshire and our donors.

We collect the information described below, in order to solicit and process applications for grants from the Foundation.

We hold data on those who apply to Foundation Derbyshire for grants, whether on behalf of an organisation or personally.

Individual Grant Applicants.

We collect the following classes of information from individuals applying for grants on behalf of themselves:

- Name(s) and address, email, phone number and other relevant contact details and communication preferences
- Purpose and details about an application for a grant
- Any other information needed for the assessment of a grant which may include financial, family, education and employment information
- Details about any grant which was made
- Information about our relationship with you, correspondence, meeting notes, attendance at events etc.



Length of Retention of Your Data.

We will keep grant applicant data for 7 years after the grant has been completed (e.g. once the grant is reported on and complete). After this time, unless we have had further correspondence from you indicating a desire to re-apply for funding, contact information and individual personal data will be deleted.

Sensitive Personal Information.

Data Protection Law recognises that some categories of personal information are more sensitive. Sensitive Personal Information can include information about a person's health, race, ethnic origin, sexual orientation or religious beliefs.

For the purpose of grants made to individuals, we may sometimes receive sensitive personal information about the recipient.

We will only use this information:

- For the purposes of assessing and processing the grant with our staff and panel members
- We will not pass on your details to anyone else without your express permission

Sensitive personal information will be treated with extra care and security and will be deleted as soon as the processing of the grant has been completed.



Organisational Grant Applicants.

We collect the following classes of information from individuals applying for grants on behalf of **organisations**:

- Name of the organisation and key contact details
- Name and data of the person making the grant application and their contact information
- Details about the aims of the organisation
- Financial information, such as accounts submitted to the charity commission
- Purpose and details about the grant application
- Details of any subsequent grant made

Length of Retention of Your Data.

We will keep basic information about the organisation applying for the grant, such as organisation name, amount awarded and purpose of the grant, on a permanent basis. If there is no further contact or activity involving the organisation after 7 years of the grant being completed, unless we have had further correspondence from you indicating a desire to re-apply for funding, contact information and individual personal data will be deleted.



Referees.

We receive basic information about referees in order to process grants to individuals and organisations. The purpose of collecting this information is to contact referees to request a reference for the relevant person or group. The information we collect is:

- Name, address, email address and phone number of referee
- Organisation if applicable
- Relationship to applicant

Length of Retention of Your Data (Referees).

Relationships between the Foundation and our grant referees are usually ongoing, particularly in the case of grants to individuals, where referees will often continue to refer new individual beneficiaries to us on an ongoing basis. We will therefore hold this data for as long as the relationship exists, or until it is no longer needed.



Donors.

Our Trustees note that the Foundation has an identified Legitimate Interest, which is the lawful basis for processing data about our Donors.

Inspiring philanthropy and the provision of philanthropic services is our core mission as a charity.

The core purposes of our data processing are to:

- build financial support for the Community Foundation
- send communications to you about the Community Foundation
- administer donations
- promote the aims and objectives of the Community Foundation

We may use data obtained other than from you to ensure that your contact details are up to date, and to ensure that appropriate due diligence is carried out to safeguard the assets and reputation of the Community Foundation.

We MAY collect the following classes of information:

- Name(s) and address, email, phone number and other relevant contact details and communication preferences
- Records of donations, Gift Aid status etc.
- Information about our relationship with you, correspondence, meeting notes, attendance at events etc.
- Information necessary for us to manage funds you have established or supported
- Relevant family or friends' information including information on successor advisors
- Occupation, skills, professional activity and network(s) and connections in Derbyshire



Length of Data Retention (Donors).

Relationships between Donors and the Foundation are often long term, and so we expect to keep your personal data and contact for as long as that relationship exists, or until we no longer need it.



Prospective Donors.

Our Trustees note that the Foundation has an identified Legitimate Interest, which is the lawful basis for processing data about our Prospective Donors.

Inspiring philanthropy and the provision of philanthropic services is our core mission as a charity.

We collect the information below to identify and engage with individuals or families whom we have reason to believe may be interested in becoming donors to the Foundation. The core purpose of holding this data is:

- For the purpose of developing philanthropy, specifically by building new relationships and sharing how the Foundation can facilitate local giving for maximum effect.
- Inspiring philanthropy and the provision of philanthropic services being our core mission as a charity.

We MAY collect the following information:

- Name, address, phone number and email address
- Information about our relationship with you, including how we were introduced, past correspondence, meeting notes etc
- Occupation, skills, professional activity and network(s) and connections in Derbyshire

Length of Data Retention (Prospective Donors).

Relationships between Prospective Donors and the Community Foundation are often long term, and we expect to hold your data for as long as we believe there is an active interest from you in finding out more about the Community Foundation.



Partners and Network of Foundation Supporters.

Our Trustees note that the Foundation has an identified Legitimate Interest, which is the lawful basis for processing data about our Partners and network of Foundation Supporters (such as professional advisors, local Councillors and others).

Inspiring philanthropy and the provision of philanthropic services is our core mission as a charity.

The processing of data is necessary to meet a specific organisational objective of the Foundation; it enables people to know about the Foundation as their go-to local charity facilitating giving and provides wide community benefit by supporting local communities and individuals in need.

We collect the information described below in order to promote and share the activities and events of Foundation Derbyshire with you.

We collect the following classes of information:

- Name(s) and address, email, phone number and other relevant contact details and communication preferences
- Information about our relationship with you, correspondence, meeting notes, attendance at events etc.
- Occupation, skills, professional activity and network(s) and connections in Derbyshire

Length of Data Retention for Partners and Network of Foundation Supporters.

Relationships between our partners/supporters and the Community Foundation are often long term, and so we expect to keep your data for as long as that relationship exists, or until we no longer need it.



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