

## Privacy Statement: Fundraising Donors

### Why do we collect personal information about fundraising donors and how do we use it?

As a charity, there are lawful bases for the personal information that we collect on our fundraising donors.

Developing good relationships with donors is essential to successful and rewarding fundraising. By creating and maintaining up-to-date profiles of donors we can build and maintain those good relationships and contact you in the most appropriate way, promoting fundraising and event opportunities of interest.

Unless there is a clear and valid reason for doing so, we do not collect sensitive personal information about our donors.

A significant lawful basis (legal reason) for collecting and using certain personal information about fundraising donors is that of “legal obligation”. In other words, we have to collect this information to comply with the law. Processing information under this lawful basis enables us to:

- Record and monitor income both for internal audit and HMRC
- Administer probate process and audit trail for legacies
- Set up standing orders
- Record Gift Aid status
- Process legacies

We also collect some of the personal data on the lawful basis of “legitimate interest” so that we can do the following:

- Generate publicity such as sharing group photos/videos from events
- Conduct appropriate postal marketing to all fundraising channels (trusts, individuals, corporates)
- Make appropriate trust applications for grants
- Seek support by approaching potential corporate supporters

Processing information on the basis of “legitimate interest” means that Dorothy House deems it necessary and appropriate to collect this information for reasons that do not require your consent. However, you can object to data processing on this basis. See Your Rights section: <https://www.dorothyhouse.org.uk/your-rights/>

We will keep in touch with you by post to tell you about other ways you can fundraise or support us. We do this on the basis of ‘legitimate interest’. If you don’t want to hear from us in this way, then please let us know by visiting our webpage <https://www.dorothyhouse.org.uk/staying-in-touch-with-you/>, by phoning 01225 721480 or by emailing [preferences@dorothyhouse-hospice.org.uk](mailto:preferences@dorothyhouse-hospice.org.uk)

If you sign up to receive our on-line newsletter, or to keep in touch with how to support us by email, we do this on the basis of ‘consent’. You can withdraw your consent any time by visiting our webpage: <https://www.dorothyhouse.org.uk/staying-in-touch-with-you/> , by phoning 01225 721 480 or by emailing: [preferences@dorothyhouse-hospice.org.uk](mailto:preferences@dorothyhouse-hospice.org.uk)

## What personal information do we collect about our fundraising donors?

Based on the data processing reasons outlined above, we may collect all or some of the information for individuals and organisations (note this list is not exhaustive):

**Basic details** including names, addresses and other contact details for individuals, legators, executors, Trusts and corporates.

**Donation information:** Donation amounts and dates, linked to donors, for all donations, including bank account details if appropriate, Gift Aid Declarations

**Other:** Donor relationship records, event participation registration and information supplied, photographs and video of event participants

## Where do we store personal fundraising donor information and for how long?

All fundraising donors' personal information as outlined above is stored on a secure database, which only Dorothy House employees and volunteers with a username and password can access. Staff receive training so that they are aware of their professional responsibility to respect confidentiality.

Your data is held on a database hosted at Dorothy House. It is used alongside a fundraising and email marketing toolset, which stores and captures on-line events registration and donations for us. Payments are processed via the US and this is covered by the EU-US Privacy Shield Framework.

We retain all donation records for a minimum of 7 years to comply with HMRC and audit requirements. There are important organisational reasons for retaining fundraising donors' information longer than this, for example legacy records and statistical monitoring. If you do not wish us to keep your information longer than 7 years, please contact us.

## Sharing personal information about fundraising donors with third parties

The Fundraising Department is responsible for storing fundraising donors' information and will need to share some of this information with third parties as follows:

**HMRC** for Gift Aid purposes

**DH's bank** for standing orders

**Third party communications services:** mailing houses, bulk email service providers survey providers, event booking systems

**Email marketing provider:** We currently use Mailchimp to manage some of our email marketing. Mailchimp stores its data in the US, although it complies with the EU-US Privacy Shield Framework and the Swiss – US Privacy Shield Framework. Mailchimp uses personal data for its own purposes. You can read Mailchimp’s privacy information here: <https://mailchimp.com/legal/privacy/>. We are currently in the process of moving to a UK/EU hosted email marketing provider.

From time to time we may use trusted third parties to assist in ensuring our donors receive the most appropriate communications from us. When we use a third party in this way we require their assurance that data is handled in line with our policies.

We don’t utilise any external provider to undertake any wealth screening and we will not utilise any external provider for telephone marketing.

Partner organisations share data in turn with us, for example:

- Event organisers (e.g. Marathon companies, Challenge companies.)
- Online giving organisations (e.g. JustGiving, Virgin Giving, Facebook Donate, LocalGiving, or when you donate using QR codes)
- Local Hospice Lottery
- Funeral Directors

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