

Date policy adopted: 24th September 2018

Last reviewed: 15th December 2021 *Ref. Minute 15/12/2021, Item 7(ii)*

1 Introduction

Alderman Newton's Educational Foundation is an unincorporated, registered charity established by Charity Scheme. The charity is established primarily for the advancement of education for persons aged under 25 who are in need of financial assistance and who live in the Diocese of Leicester. The Foundation also supports specified educational charities. The Foundation achieves its objects principally through the provision of grants to its beneficiaries, details of whom are set out in the Charity Scheme.

The Foundation is governed by a Board of Trustees, which, without vacancies, consists of six nominative Trustees and seven co-optative Trustees.

Applications for charitable assistance from the Foundation are considered by the Education Committee. The Committee consists of three Trustees and a further Trustee as reserve Committee member.

This Privacy Policy sets out the Foundation's policy and procedure on protecting the privacy and personal data of those who apply to the Foundation for charitable grant aid.

2 Privacy Policy

We will look after any personal information that you share with us. We can appreciate that our application process asks for quite a lot of personal information. We need this information in order to make decisions in accordance with our governing document (Charity Scheme) and the policies of the Board of Trustees.

You can be confident that:

- We only use personal information in the ways we need to and that is expected of us.
- We will never release your information to other organisations for their marketing purposes.
- We will be especially careful and sensitive when engaging with children under 18, vulnerable people or those we have reason to believe might be vulnerable.
- We will take all reasonable care to safeguard your personal information through our policies and secure business processes.
- We will always be happy to answer any queries you have.

The Foundation engages the services of Charity Link to provide its day to day administration. Charity Link is the Data Controller for Alderman Newton's Educational Foundation. Charity Link has its own Privacy Policy, which you can find on their website: <http://charity-link.org/privacy-notice/privacy-policy/>

Charity Link may use your personal information to:

- Communicate with you about your application for grant aid;
- Provide the Trustees with relevant information to enable them to make a decision about your application;
- Administer any grant that is awarded;
- Maintain proper records of, monitor and evaluate our charitable activity.

We will not pass on your details to anyone else without your express permission - except in exceptional circumstances such as the need to safeguard a child or vulnerable adult. We will never sell or share your personal information with organisations so that they can contact you for any marketing activities.

Your personal information will be stored on a secure database or in paper files for no longer than is necessary for the purposes of its use. We carry out periodic deletion of data whose retention period has expired and/or when the need to continue holding such data is no longer necessary.

You may ask us at any time to update your details, correct or remove information you think is inaccurate, or to request a copy of the personal information we hold about you, by:

Post - The Clerk to the Trustees, Alderman Newton's Educational Foundation, c/o
Charity Link, 20A Millstone Lane, Leicester LE1 5JN

Email - trustadmin@charity-link.org

Telephone - 0116 222 2200

Should you wish to withdraw or withhold consent for your personal information to be stored or used in any of the ways described in this Privacy Policy, then please contact the Clerk to the Trustees at the address above. Please be aware that some personal information is necessary in order for the Trustees to make a decision about your application for a grant, and our ability to do so may be affected should your consent be withdrawn or withheld.

3 Procedure

The information we receive from you will include your completed application form, accompanying documents and any contact or correspondence that we, or Charity Link as our administrators, have with you. This information will be stored and processed by Charity Link. All personal data is stored in a secure location.

This information will be securely transmitted to the Foundation's Education Committee, which considers all the applications received and makes recommendations to the Board of Trustees.

The Board of Trustees receives grant recommendations in anonymised form in order to make grant decisions.

During the course of processing your grant application and/or any grant that is awarded, Charity Link may need to contact on our behalf:

- The education or training institution that is providing your course;
- Your accommodation provider, if you have applied for a grant towards accommodation costs;
- Any of the referees listed on your application form, or who have provided a reference;
- Your parent or carer/guardian if you are under 18, or if you are a vulnerable adult; or your corporate parent, if you are in the care of a local authority.

This contact may be made for the purpose of (for example):

- Verifying or clarifying information provided within your application;
- Obtaining further information to support your application;
- Arranging your interview with the Education Committee; or
- Arranging payment of any grant.

During the course of this contact, we will need to disclose that you have applied to or been awarded a grant by Alderman Newton's Educational Foundation.

We will not disclose any information about your application or any grant award to any other third party.

Video meetings

We may need to have a video meeting with you, for example to discuss your application. This will usually take the form of an interview with the Education Committee. Video meetings may be recorded. We may collect data during video meetings such as:

- Information about your household circumstances and who you live with;
- Information about your total household income and your personal finances;
- Information about your course of study and your future plans.

We need this data in order to:

- Confirm that you are eligible for grant aid from our charity;
- Decide whether to recommend that you be awarded a grant.

We use this data to make a recommendation about your grant application (occasionally, we may need to request further information before a recommendation can be made). Our recommendation will be recorded anonymously in the minutes of the Education Committee meeting (no personal data is included, only reference numbers are used). These minutes are circulated to the Board of Trustees to ratify the recommendations made.

Our lawful basis for processing this data is **legitimate interests**. This is because it is in your interest for us to obtain sufficient information to be able to make a recommendation on your grant application.

Only the members of the Education Committee have access to the data shared during video meetings. We may occasionally need to pass on information to the Clerk to the Trustees, for example where we need to contact you for further information.

We are not able to share any recording of the video meeting with you because the recording may also contain interviews with other applicants. Should you wish to correct any information that was given during the meeting, please contact the Clerk to the Trustees.

Video recordings will be erased following the subsequent meeting of the Education Committee. For example, the video recording of a meeting held in June would be deleted following the next meeting in July.

When attending a video meeting, please be mindful of your own privacy. We ask you to bear in mind the following:

- If you turn on their camera, your image will be visible to everyone in attendance (other applicants will not be in the meeting at the same time as you – only the Education Committee members);
- If you turn on your microphone, everyone in attendance will be able to hear you;
- Depending on how you have set up your account, your name and other details may be available to other attendees;
- What you say during a video meeting may be recorded;
- If you screen share, or if you discuss confidential ('special category') information, this too may be retained as part of the recording;
- Everyone in attendance will be able to see your surroundings, which may include any other people or information in the background (unless you use a virtual background).

The video conferencing software used by the Foundation will usually be Zoom.

4 Monitoring and Review

This Policy will be subject to a formal review every 3 years, or more often where there are changes in relevant law, regulations, or guidance, or significant change within the Foundation.

The Board of Trustees is responsible for monitoring and reviewing the Policy.