

The Laurel Trust

Privacy Notice

# Privacy Notice

Laurel Trust (Registered Charity Number: 1117330, Company Limited by Guarantee and Registered in England Number: 05774260, with registered office at c/o Stone King LLP, Boundary House, 91 Charterhouse Street, London, EC1M 6HR.) (“the Trust”) is committed to protecting and respecting your privacy. For the purposes of the UK General Data Protection Regulation (the “UK GDPR”), Data Protection Act 2018 and any subsequent UK legislation covering data protection, the Trust is the controller of the personal data it processes.

This Notice sets out why we collect certain personal data and how we use it. It explains the legal basis for our processing of your personal data and the rights you have over the way it is used.

We may update this Notice from time to time. We will advertise any changes on our website or, in case of significant changes, we will provide the relevant information to you directly.

If you have any questions about this Notice or the use of your personal data by the Trust, please contact the Chair of Trustees, Bill Goddard by post to the Trust’s registered office at c/o Stone King LLP, Boundary House, 91 Charterhouse Street, London, EC1M 6HR.

## What type of personal data we collect

The type of personal data we collect depends on the purposes for which we will need to use it.

The personal data we collect when you contact the Trust comprises your name, contact details, professional or volunteer role, workplace or institutional email address, workplace or institutional postal address and your phone number. We collect this data to communicate effectively with you.

If you are a trustee, consultant or volunteer involved in a research project supported by the Trust, we will collect your name and contact details to contact you in relation to the Trust’s educational activities, your financial details for payment of any expenses you may have incurred supporting the Trust’s activities, and any other personal data we are required to collect by law.

If you are a grant applicant as part of a collaborative partnership with a lead school, the personal data you are asked to provide is as set out in the application form and is limited to the information necessary for us to consider the application. If your proposal is awarded a grant, we will use your personal data for communicating effectively with you throughout the research project and with regards to the dissemination of outcomes.

## How we collect your personal data

We may collect your personal data:

- (1) directly from you when you contact us or have any involvement with the activities of the Trust, for example when you:
  - visit our website and contact us (we do not use cookies nor other tracking technologies);
  - enquire about our activities or grants or apply for a grant;
  - participate in a collaborative partnership with a lead school undertaking a research project receiving funding from the Trust;
  - attend a meeting with us or participate in a conference, seminar or the preparation of a publication
  - contact us in any way including email, phone or post;
  - and provide us with your personal data.

- (2) from other organisations when you have given them permission to share your personal data with us. Your personal data may be provided to us with your permission by the lead school and/or other partners in your collaborative partnership applying for a grant or undertaking a research project with funding from the Trust or your contact information may be provided to us by other educational organisations which are partners in research projects supported by the Trust such as a local authority, diocesan authority, university, Teaching School Alliance, Multi Academy Trust, other form of school consortia, partnership of providers including Early Years Networks or specialist educational membership organisation.

### **How we use your personal data**

We use your personal data for a number of purposes consistent with the legal basis that we rely on when processing your data. These include:

- providing you with the information or guidance you have asked for;
- using your contact detail when organising and registering you for induction conferences and other forms of training and guidance;
- sending you communications with your consent including promotional materials announcing new tranches of grants for educational research;
- when necessary for carrying out our obligations under the contract between us and the educational providers receiving grants from the Trust;
- seeking your views on the services or activities we carry on so that we can make improvements;
- maintaining our organisational records and ensuring we know how you prefer to be contacted;
- processing grant applications;
- communicating with all involved in research projects receiving funding from the Trust and monitoring progress including arranging visits by trustees and/or consultants;
- communicating with all involved in the Trust's dissemination activities including conferences and publications;
- providing information to volunteers where appropriate; and
- providing information to our trustees responsible for the governance of the Trust and monitoring its activities, commissioned consultants responsible for managing the operations of the Trust and our professional advisers including our solicitors (Stone King LLP), auditors (MacIntyre Hudson LLP) and outsourced financial management provider (MacIntyre Hudson LLP) to facilitate seeking legal advice and/or payment of grants to lead schools and their collaborative partnerships.

We do not use your personal data for any automated decision making or profiling.

### **Our legal basis for processing your personal data**

The use of your personal data for the purposes set out above is lawful because one or more of the following applies:

- Where you have provided your personal data to us for the purposes of requesting information and guidance on the activities of the Trust to promote educational research and dissemination or applying directly or via involvement in a collaborative partnership for a grant to help fund a research project, we will rely on the lawful basis of legitimate interests (the Trust's or a third party's) or, where appropriate, we will collect your consent. Where we collected your consent, you may withdraw it at any time by emailing the Trust's Chair of Trustees at [info@laureltrust.org.uk](mailto:info@laureltrust.org.uk). This will not affect the lawfulness of our processing of your personal data prior to your withdrawal of consent.

- Where it is necessary for us to process your personal data to carry out our obligations under the contract (Memorandum of Agreement for a Laurel Trust Grant) entered into with you directly or to take steps you ask us to take prior to entering into a contract, we will rely on the lawful basis of contractual necessity.
- Where the purpose of our processing is the provision of information or services to you, we may also rely on the fact that it is necessary for your legitimate interests and those of the Trust that we provide the information to our outsourced financial manager, auditors and/or solicitors to facilitate such actions as payments of grants, monitoring expenditure for auditing purposes and ensuring legal compliance.
- Where it is necessary to comply with our legal obligations such as, for example, providing financial information on charitable expenditure for the annual statutory audit required by charity and company law, we will rely on the lawful basis of compliance with a legal obligation.

Where we are relying on the fact that a particular processing purpose is necessary for our legitimate interests, or the legitimate interests of a third party, you can obtain information about the balancing test we have undertaken on request by contacting the Chair of Trustees at the Trust's Registered Office.

### **How we keep your personal data safe**

We understand the importance of security of your personal data and take appropriate steps to safeguard it.

Under our environmental policy, we make every reasonable effort to be a paper-free organisation and therefore our materials are available on-line and our communications are sent electronically by email with documents attached.

We always ensure only authorised persons such as trustees, commissioned consultants and professional advisers have access to your personal data on 'needs to know basis'. Such persons are subject to confidentiality undertakings, have the appropriate training and professional experience to ensure confidentiality and integrity of your personal data.

We implement adequate technical and organisational measures to ensure a level of security appropriate to the risks of our processing of your personal data. We require all those with access to personal data within the Trust to comply with organisational and technical measures that we have put in place to protect any personal data that we need to use.

### **Who has access to your personal data?**

The following categories of recipients may access your personal data:

- professional advisers and service providers including third party solicitors and auditors and providers of book-keeping, banking and investment advice and management services. We always select our third-party service providers with care (our professional advisers are subject to the UK GDPR and have renowned national awards and positioning for charity services) and only provide these third parties with the personal data that is strictly necessary for them to provide their service.
- We may also disclose your personal data if we are required to do so under any legal obligation.

Other than this, we will not share your personal data with other organisations without your consent.

### **Keeping your information up to date**

We take care to ensure that your personal data we hold is up to date and we would really appreciate it if you could let us know when your contact details change. You can do so by contacting the Chair of Trustees at the Registered Office.

## **Our use of cookies**

We do not use cookies nor any other tracking technologies on our website.

## **Children's and special category personal data**

All involved in the governance and operations of the Trust have substantial qualifications and professional experience in the education sector and are fully aware of our legal obligations in relation to both children's personal data and special category personal data.

The Trust does not collect or process any special category personal data or any personal data of children involved in research projects. The processing of children personal data is the responsibility of the schools and other educational providers involved in research projects receiving grants from the Trust. The Trust will not have access to such data.

## **How long we keep your personal data for**

We will hold your personal data for as long as it is necessary for the relevant processing purpose. By way of example, we hold records of those who enquire about the activities of the Trust for two years and for those involved in a research project receiving a grant from the Trust and dissemination activities for 5 years.

## **International transfers of personal data**

We aim to ensure that the processing of personal data takes place within the UK or the EEA. Occasionally, some of our service providers may need to transfer personal data outside the UK/EEA and if it happens, they are required to ensure that adequate safeguards compliant with the UK GDPR are in place at all times.

## **Your rights and complaints**

You have the right to obtain confirmation whether we process your personal data, and, where that is the case, access your personal data and request details of the processing activities involving your personal data through making a Data Subject Access Request. To make a request, please contact the Chair of Trustees at the Trust's Registered Office.

You also have the following rights under the UK GDPR:

- the right to request rectification of your personal data that is inaccurate or out of date;
- the right to erasure of your personal data (known as the "right to be forgotten");
- the right to restrict our processing of your personal data; and
- in certain circumstances, the right to request that your personal data be provided to you in a format that is secure and suitable for re-use (known as the "right to portability").

All of these rights are subject to certain exemptions and restrictions set out in data protection law. To exercise any of these rights or to raise any queries or complaints in relation to the way we process your personal data please contact the Chair of Trustees at the Trust's Registered Office.

If you are not happy with the way in which we have processed your personal data or dealt with your request, you can complain to the Information Commissioner's Office. Further details about how to complain can be found at <https://ico.or.uk/make-a-complaint/>.

## **Changes to this Privacy Notice**

This Notice may be revised and updated from time to time. We will advertise any updates on our website and if we make any significant changes, we will contact you directly with the information.

Please check this Notice when you consider giving us your personal data. This Notice was last updated in January 2021.

Review Period: 2 years

Owner: The Laurel Trust