

PRIVACY POLICY

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Introduction

This document explains how we at Lincolnshire Community Foundation CIO use personal data relating to living identifiable persons (LIPs).

Why do we need your information

We believe that thriving communities with caring people and strong voluntary groups give everyone the chance to achieve their best. Thriving communities are built on time, money and effort that enables ambition to be achieved, potential fulfilled and ends to be met. We use personal data to help organise the giving of that time, money and effort in Lincolnshire.

Whose data do we collect

We hold data on those who have given financial or other support to the Community Foundation, those who might do so, and those who apply to the Community Foundation for grants, whether on behalf of an organisation or personally.

How we obtain your data

The majority of the information we hold about you has been provided directly to us with consent by you. In some cases we may collect data from someone else. Examples include where existing supporters feel you may be interested in supporting our work and suggest your name to us.

We also collect data from publicly available sources. Examples include information gathered from a news article or on-line media, including social media like LinkedIn or Twitter. We may also use publicly available directories and similar information such as the Royal Mail's National Change of Address database and Companies' House.

What we do with your data and why supporters and volunteers

The core purposes of our data processing are to:

- Build financial and volunteer support for the Community Foundation through various fundraising and marketing activities;
- Send communications to you about the Community Foundation;
- Administer donations (including but not limited to funds which are subject to Philanthropy Agreements);
- Administer volunteering opportunities and programmes where we match volunteers with community needs;
- Promote the aims and objectives of the Community Foundation through other

We may use data obtained other than from you to ensure that your contact details are up to date, to plan our fundraising (including using indicators of affluence so as to reflect the possible level of donation someone is able to make) and to ensure that appropriate due diligence is carried out to safeguard the assets and reputation of the Community Foundation.



We collect the following classes of information

- Name(s) and address, email, phone number and other relevant contact details and preferences;
- Relevant family or friends' information including information on successor advisors;
- Occupation, skills and professional activity and network(s);
- Financial information and interest in philanthropy information relating to links and connections with and in the East Midlands. Records of donations including assets used to make donations, Gift Aid status;
- Records of volunteering for the Community Foundation;
- Information about our relationship with you, correspondence, meeting notes, attendance at events
- Information necessary for us to manage funds you have established or supported.

Information on grantees

We collect the information described below in order to solicit and process applications for grants from the Community Foundation. Some of the information may also be processed in the ways described above under “Supporters and Volunteers” since many grantees also volunteer for the Community Foundation or support its work in some way.

As part of our grant management process, we use a secure external AI platform called *Plinth* to support the assessment and administration of applications. This platform helps streamline and strengthen our due diligence procedures.

During the grant assessment process, we may request confidential supporting documents, such as identification, financial accounts or safeguarding policies. These documents are stored securely on Plinth's servers, which meet recognised data protection and security standards.

Documents will be retained for up to six years in accordance with our data retention policy but may be deleted earlier upon request by Lincolnshire Community Foundation.

We collect the following classes of information

- Name(s) and address, email, phone number and other relevant contact details and 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.

Protecting your data

We keep your data secure in our database with appropriate security mechanisms in

place. In principle we do not share your data with anyone else or any other organisation unless it is necessary for the purpose for which you have given us the data. Examples are given below:

- We will provide information to HMRC on Gift Aided donations since we have a legal obligation to provide this information
- We will share information on grant applicants with grant panel members and These are volunteers working with the Community Foundation. We will also publish data on grant recipients for groups/organisations (amounts/names/purpose) but we anonymise details for any individual grantees



- We may share basic information on the attenders at an event or function or meeting with the host or other person who has a volunteer role in the Community Foundation
- We may pass data to other organisations, known as Data Processors, to provide specific services to us. An example would be providing data to an assessor to carry out work on our behalf. A contract is always in place with a Data Processor, and they are not allowed to do anything with your data other than that which we have

Our responsibilities

The law requires us to tell you the basis on which we process your data.

- Some activities (for example sending you emails which promote the Community Foundation's interests) require your consent. If the law requires your consent to process data in a certain way then we will obtain it before carrying out that activity

- Other activities are carried out to fulfil a contract or agreement. Examples include holding funds which are subject to Philanthropy Agreements or organising a ticketed event. Each requires us to know who you are and to process your information in order to do the thing you have asked us to do. If a contract is in place then we will process your data based on that contract
- In all other cases the law allows us to process your data if it is in our legitimate interest to do so, but only so long as we need to and your "interests or your fundamental rights and freedoms are not overriding". Practically speaking, this means we consider that we will not cause you harm by processing your data, that the processing is not overly intrusive and that we will only do so in a way which is described in this privacy notice
- We will keep data for as long as it is needed to complete the task for which it was collected. Relationships between donors, grantees 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 in line with our retention of information

Your rights

The law requires us to tell you that you have a variety of rights about the way we process your data.

These are as follows:

- Where our use of your data requires consent, you may withdraw this consent at any time
- Where we rely on our legitimate interest to process data, you may ask us to stop doing so
- You may request a copy of the data we hold about you
- You may change or stop the way in which we communicate with you or process data about you, and if it is not required for the purpose you provided it, then we will do so. Activities like processing Gift Aid donations, or managing a



Philanthropy Agreement, may mean we cannot entirely stop processing your data. We will always endeavour to comply with such a request.

If you are not satisfied with the way we have processed your data then you can complain to the Information Commissioner's Office (ICO).

Contacting us

If you have any questions about this privacy notice, about the way in which we process your data, or if you wish to change the way we use your data, including how we communicate with you, then please contact us by email info@lincolnshirecf.co.uk or 01529 305825.