



THE WATERLOO FOUNDATION PRIVACY POLICY

This privacy policy tells you how and why we may collect and use your data, and what to do if you have a question or concern.

The organisation

The Waterloo Foundation ('the Foundation', 'us' or 'we') is a charity registered in England and Wales under charity number 1117535. Our registered office is 46-48 Cardiff Road, Cardiff, CF5 2DT.

We are an independent grant-making organisation with a particular focus on the disparity of opportunities, wealth and the unsustainable use of the world's natural resources. The Foundation both controls and processes data, to enact these charitable objectives.

For the purpose of this notice The Waterloo Foundation (the Foundation) is a "data controller".

How we approach privacy

In order for us to carry out our activities we need to collect information relevant to your connection and relationship with the Foundation. This includes personal information.

We take your privacy seriously and respect any information which you share with us, and whatever your relationship with us. We recognise the importance of your privacy and are committed to ensuring it is protected. We aim to be transparent and not to do anything you might not reasonably expect. We will never sell or rent your data to third parties, nor pass it on to third parties without your prior knowledge and consent.

This privacy policy gives you an understanding of what information the Foundation collects, why we need it, how we use it and what protections are in place to keep it secure. It is published on our website, and copies are available on request from at info@waterloofoundation.org.uk

How we collect information from you

We collect and use different types of information about you and your organisation depending on your circumstances and your relationship with us. This may include personal information you share with us.

There are a number of ways you might share your information with us, including:

- a) By approaching the Foundation in the interests of applying for a grant;
- b) If you contact us with enquiries, correspond with us or become involved with us in another way (including via social media outlets);
- c) By applying for a job vacancy at the Foundation;
- d) If your details are passed to us by another organisation within the terms of their privacy policy, for example as a means of obtaining a reference;
- e) On occasion we may also collect information which is publicly available (such as your professional address, email address or telephone number), e.g. via your organisation's website, professional profile or Charity Commission record.

What type of information we might collect and process about you

We will only collect information which is directly relevant to your particular relationship with the Foundation and for which you have given us consent to collect and retain.

The personal information we might collect includes:



- a) The names, email addresses and other contact details of the key point of contact in relation to a particular grant application or grant query;
- b) Records of your correspondence with us;
- c) The full contents of your grant application(s), and the ultimate funding decision made;
- d) Any financial or payment details required to process successful grant payments;
- e) Monitoring and evaluation reports, and ad-hoc updates on projects or donations.

We will never collect or retain your personal data or sensitive personal data without your informed consent.

How we use your information

We will only use your data under the lawful bases of legitimate interest or contract. We may use your information to:

- a) Administer your funding application, including requesting further information from you in relation to your application;
- b) Conduct due diligence upon an organisation or project, through the review of prior applications received or previous grants from us to your organisation;
- c) Produce internal documentation for Trustees in the furtherance of decision-making on particular applications;
- d) Produce internal documentation for Trustees for the purposes of monitoring and evaluating projects;
- e) Make payments to successful applicants, as agreed in our standard offer letter (or contract);
- f) To obtain a reference about a particular organisation or individual;
- g) To ask your permission to share details of your project/organisation with other relevant organisations/individuals;
- h) To alert you to third party events, conferences or meetings which may further your charitable activities or objectives;
- i) To process job applications.

From time to time we may also use your data to:

- a) Conduct broader reviews of our funding within a sector, through the analysis of past applications and projects; these reviews will only ever be shared internally within the Foundation, or with appointed consultants of the Foundation.

We do not engage in marketing activities, including profiling or producing mailing or circulation lists.

How we protect and store your information

We take the protection of your data very seriously. All information you provide to us is stored securely and treated with care and respect. Appropriate technical controls are in place to store and protect data. We have security procedures in place to guard against unauthorised access, improper use, alteration, destruction or accidental loss of your information. Information is only accessible by appropriately trained and authorised staff for the specific purpose of their work at the Foundation.

All data that we collect from you is stored within the European Economic Area.

Who has access to your data?

Our staff, Trustees and consultants may access your data to enact a particular activity of the Foundation, for example as part of our grant-making process. Our Finance Manager may access your payment details to make a grant payment, or our Office Manager may access your organisation's contact details to query a monitoring report.

How long we keep your information

We keep your data in line with legislation and statutory guidelines relevant to your relationship and connection with us. All records are destroyed confidentially once their retention period has been met, and the Foundation has made the decision that the records are no longer required.

Sharing your information

There are a number of reasons we may share your information and this can be due to:

- Our obligations to comply with current legislation
- Our duty to comply with a court order or legal obligation.
- To enforce or apply any agreements, or to protect the rights, property or safety of the Waterloo Foundation.
- Where you have given your explicit and informed consent for us to share your personal story to help further our work

We never sell or rent your data to third parties.

General Data Protection Regulation (GDPR) - your personal data

We aim to ensure that the information we have for you is accurate and up-to-date. You can request to see this information and if, for example, you believe that something is incorrect or you do not wish us to retain it you can ask to have it corrected or deleted. You may

- Request a copy of the personal information we hold about you (a 'Subject Access Request');
- Update or amend the personal information we hold about you if it is wrong;
- Ask us to remove your personal information from our records;
- Raise a concern or complaint about the way in which your personal information is being used.

If you would like to request access to the personal information we hold about you, please send your request in writing outlining a description of the information you want to obtain and a proof of your identity to:

Head of Operations
The Waterloo Foundation
46-48 Cardiff Road
Cardiff
CF5 2DT

We do not accept requests of this nature by email as we must ensure that we only provide personal data to the individual it relates to.

The Foundation will reply to a formal request within one month of receipt.

If you wish to raise a complaint on how we have handled your personal information you can ask us to investigate the matter by sending a written request to:

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The Waterloo Foundation
46-48 Cardiff Road
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Policy review

This policy was reviewed in September 2019.