#### Peter Harrison Foundation (“the Foundation”)

Registered Charity, number 1076579.

**Privacy Notice and Data Retention Policy**

1. **Introduction**

The Peter Harrison Foundation (‘the Foundation’) is a registered charity (No. 1076579). We are an independent grant making trust that supports registered charities and Community Amateur Sports Clubs (CASCs) in the United Kingdom.

In order to pursue our aim and to comply with our policies, we receive, store and make use of information about our Grantees and Applicants. Some of this information is Personal Data under the General Data Protection Regulation (GDPR). This Privacy Notice sets out details of the information that we collect and hold in order to comply with the GDPR.

The Foundation adheres to the principles of the General Data Protection Regulation, which specify that personal data must be:

* processed lawfully and fairly;
* collected for specific purposes;
* relevant and limited to what is necessary;
* accurate;
* kept secure and for no longer than necessary.

Personal data is information relating to an identifiable individual or individuals which may be provided through the Foundation’s website, by email or post, over the telephone or in person.

The Foundation may collect and hold personal data associated with the following:

* registered charities and other organisations applying for or in receipt of charitable grants;
* children and their families or carers applying for or in receipt of Harrison Scholarships at Reigate Grammar School;
* the Foundation’s trustees;
* the Foundation’s employees;
* suppliers of goods and services.

1. **Data Controller and individual responsible**

The Peter Harrison Foundation, the Data Controller responsible for your personal data, is located at Foundation House, 42 - 48 London Road, Reigate, Surrey, RH2 9QQ. The trustees of the Foundation have appointed Sarah Ridley (Director) to be the individual responsible for Data Protection matters. She may be contacted by email at [sridley@PeterHarrisonfoundation.org](mailto:sridley@PeterHarrisonfoundation.org).

1. **Data Processors**

The Foundation has contracts for IT support services with two, third party providers:

* Gallery Partnership Ltd - hosts the Foundation’s cloud-based data storage and website
* Beacon CRM – hosts the Foundation’s Grants Management System (including the online application portal and grants database)

As such, both providers are Data Processors for the Foundation, and are under a contractual obligation to maintain data privacy and security on behalf of the Foundation and to ensure that data is processed in strict accordance with the Foundation’s requirements.

1. **Purpose of the processing and legal basis for the processing, legitimate interests of the Data Controller**

We hold and make use of your data in order to administer applications and any grants we may award. We need to collect and hold this data in order to conduct our due diligence and to make reasonable assessments when awarding grants and in order to implement grants in accordance with their terms over the life of any grant. We may continue to hold your personal data beyond any final grant payment date to inform future grant applications and to enable us to review the impact of our grant making activities. As we are a grant making Foundation, holding this data to make and implement grants is in our legitimate interests and this is our legal basis for processing your data.

1. **Personal Data collected and stored by the Foundation and how it is used**

5.1 Grant Applicants

* Applicants’ name, business address, email address and telephone numbers.
* The names and contact details for any third-party referees provided by the grant applicant.
* Records of meetings and telephone conversations between grant applicants and the representatives of the Foundation.
* Individual case studies presented as examples of a grant applicant’s work.

The information above will be collected and stored on the Foundation’s GMS database (provided by Beacon), which is accessible only to Foundation staff, and subject to password protection and 2 factor authentication. The information will be processed for the purposes of grants assessment, awards, and evaluation.

5.2 Harrison Scholarships

*5.2.1 Scholarship applications 2000 – 2021*

During this period applications for Harrison Scholarships were processed jointly by the Foundation and Reigate Grammar School (RGS). Personal data collected and stored by the Foundation included: names, address, date of birth, exam results, other academic attainments, extra-curricular interests, school attendance and disciplinary records, family circumstances and any other relevant factors likely to help the Foundation’s trustees to determine an applicant’s suitability for a scholarship and/or additional financial assistance. The parents/guardians of a bursary applicant may also have provided detailed evidence of family income and financial or other assets, including payslips, bank statements, statements of mortgage or other debt.

This information is securely held at the Foundation’s offices and may only be accessed by the Foundation’s trustees and staff. It will not be disclosed to any third party other than, if appropriate, the Bursar at Reigate Grammar School. The information is only used for the purpose of assessing the need and suitability for a Harrison Scholarship.

The personal data concerning a successful applicant and his or her family will be kept for the duration of the scholarship period, normally seven years from the date of admission to Reigate Grammar School. Subject to specific consent from school leavers themselves the names, contact details, further education and career details of former Harrison Scholars will be sought and retained beyond that period in order for the Foundation to evaluate the long-term benefits of its investment in educational bursaries.

*5.2.2 Scholarships awarded 2021 onwards*

Since 2021 applications for Harrison Scholarships have been processed by Reigate Grammar School. Personal data provided to, and stored by, the Foundation includes:

* Child’s name
* Area of residence (not full address)
* Current school
* Extra-curricular activities and academic attainments
* Parents’ names and jobs
* Notes about family circumstances relevant to the application

This information is securely held at the Foundation’s offices and may only be accessed by the Foundation’s trustees and staff. It will not be disclosed to any third party. The information is only used for the purpose of assessing the need and suitability for a Harrison Scholarship.

The personal data concerning a successful applicant and his or her family will be kept for the duration of the scholarship period, normally seven years from the date of admission to Reigate Grammar School. Subject to specific consent from school leavers themselves the names, contact details, further education and career details of former Harrison Scholars will be sought and retained beyond that period in order for the Foundation to evaluate the long-term benefits of its investment in educational bursaries.

Employees

For the primary purpose of payment and taxation the Foundation will hold and process name, home address and telephone number, National Insurance number and bank details. In case of emergency the Foundation will keep the name of an employee’s next of kin or nominated third-party contact.

Suppliers

The Foundation will hold and process personal data associated with suppliers of goods and services only for the purpose of obtaining quotes for or receipt of such goods and services.

### **Retention period**

We review how long we keep your personal data on a regular basis. We will keep your personal data on our secure systems for as long as is necessary, both to administer your grant / scholarship and for our own review purposes, in accordance with the GDPR.

### **Recipients of personal data**

We will not sell or otherwise pass your personal data to third parties (except as may be required by law or regulation, or directly in connection with your grant).

1. **Individual rights**
   1. You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all of your personal information, please email or write to us at the contact address above.

We want to make sure that your personal information is accurate and up to date. You may ask us to correct or remove information you think is inaccurate.

* 1. To the extent that, now or in the future, we rely on your consent as our lawful basis for processing your personal data, you have the right to withdraw that consent at any time.
  2. You have the right to lodge a complaint with the Information Commissioners’ Office if you think we have processed your personal data inappropriately.

1. **Comments and Queries**

If at any time you have a comment or query about the Foundation’s data management or about personal information held by the Foundation, please contact the Director by email at [sridley@PeterHarrisonfoundation.org](mailto:aross@PeterHarrisonfoundation.org)

Approved: April 2018 Last reviewed: October 2023