

# More

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## Privacy Notice

### About whom do we process data?

More Partnership processes personal data which relates to our clients' donors and potential donors. We also process data about people who work for our clients and others with whom we have or have had a business connection.

### What kind of safeguards are in place?

There are two types of safeguards. The first relates the legal status of the personal data and the second to the security of the data.

### Legal status

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The legal status of data given to us by a client is controlled by a contract between ourselves and the client. This determines how we use personal data passed to us by the client. We only use this data in the way in which the client has requested. In that respect, we act as a Data Processor as defined in the Data Protection Act 1998. Ultimate control of the personal data remains with the client.

Some of our work requires us to collect additional data from donors and potential donors whom we meet. In that respect, we act as both Data Processor and Data Controller, processing data fairly and lawfully.

We also act as a Data Controller in respect of data we hold on staff who work for our clients and potential clients, as well as others with whom we have a business connection.

### Security status

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We have extensive provisions to ensure data is kept securely. These provisions are revised on an ongoing basis as technology changes. In particular, portable devices (e.g. smartphones/tablets) are capable of being erased remotely should they be lost or stolen and all removable media is hardware encrypted. Our email system requires two-step authentication.

### What data do we process?

In carrying out our work as fundraising consultants, we hold data, whether as a Data Processor or Controller, which helps us to understand an individual and their relationship with the organisation they support or may support. This information may include:

- Basic personal details, including name and age;
- Contact details;
- Nature of the relationship with our client, including information about past giving to the client and hoped for future giving;
- Financial, business, family and networking information since this often has a material impact on the way in which the person pursues their philanthropic interests;

- Educational information and affiliations to organisations which are in the public domain.

In carrying our administrative and marketing work for our own firm, information we hold includes:

- Name;
- Employment and contact information;
- Communications preferences.

### **What do we do with the data?**

In general terms, we use data to provide both general and specific advice to clients on the planning and implementation of fundraising and supporter relations activities. This may include statistical analysis of data provided to or obtained by us.

If we are carrying out interviews with donors and potential donors and supporters, we seek a person's permission to take and to keep notes of our conversation(s) and correspondence. We ask the person to tell us what we may disclose to the client and what we may not. We may securely retain our notes following the close of a particular contract with the client since we have found that these are useful to the client should they choose to work with us again. It is also important for us to know with whom we have met in order that we can properly respect the relationship between a particular individual and the client(s) with whom that person interacts.

In pursuit of our own business interests we use personal data to manage our contractual relationship with clients and to send news of interest about our firm and its services and about broader areas of interest to clients. We may do this by post, telephone or email.

### **To whom do we disclose information?**

In our capacity as a Data Processor we never disclose any information to a third party unless the client to whom the data belongs requests or permits us to do so in writing.

In our capacity as a Data Controller we do not pass control of personal data to any other organisation except with the consent of the individual data subject.

### **How long do we retain information?**

In our capacity as a Data Processor we keep information for so long as the contract with our client requires.

In our capacity as a Data Controller and for our client work we keep information for as long as is necessary for us to carry out our work as fundraising consultants. In respect of interview notes we and the data subjects often find it very helpful if we have a record of discussions that took place between us even many years earlier. If a donor wishes us to remove this information we will of course comply with that request. This can be effected by contact with our Head Office by mail, phone or email.

For administering our own business, we retain data while clients are working with us and for a reasonable time beyond until such a time as repeat business seems unlikely. A data subject may ask us to remove them from our database or from the receipt of communications at any time. This can be effected by contact with our Head Office by mail, phone or email.