

The Heritage Alliance

Privacy Policy

The Heritage Alliance (“HA”, “we”, “our”, “us”) (registered charity number 1094793 and registered company number 4577804) is committed to protecting your privacy. At all times we aim to respect any personal information you share with us, or that we receive from others, and keep it safe. This Privacy Policy (“Policy”) sets out our data processing practices and your rights and options regarding the ways in which your personal information is used and collected (including through our website – www.theheritagealliance.org.uk).

This Policy contains important information about your personal rights to privacy. Please read it carefully to understand how we use your personal information.

The provision of your personal information to us is voluntary. However, without providing us with your personal information, your use of our services or your interaction with us may be impaired. For example, you may be unable to sign up for Heritage Update or to register as a member.

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1. How we collect personal information about you:

a. When you give it to us **directly**

For example, personal information that you submit on your membership form, signing up for our newsletter Heritage Update, joining one of our advocacy groups or by contacting us for other purposes such as payment of bills.

b. When we obtain it **indirectly**

For example, your personal information may be shared with us by third parties including third party service providers, analytics providers and search information providers. To the extent

we have not done so already, we will notify you when we receive personal information about you from them and tell you how and why we intend to use that personal information.

c. When it is **available publicly**

Your personal information may be available to us from external publicly available sources. For example, depending on your privacy settings for social media services, we may access information from those accounts or services (for example when you choose to interact with us via Twitter).

d. When you visit our **website**

When you visit our website, we automatically collect the following types of personal information:

- (a) Technical information, including the internet protocol (IP) address used to connect your device to the internet, browser type and version, time zone setting, browser plug-in types and versions and operating systems and platforms.
- (b) Information about your visit to the websites, including the uniform resource locator (URL) clickstream to, through and from the website (including date and time), services you viewed or searched for, page response times, download errors, length of visits to certain pages, referral sources, page interaction information (such as scrolling and clicks) and methods used to browse away from the page.

We also collect and use your personal information by using cookies on our website – please see our [Cookie Policy](#).

In general, we may combine your personal information from these different sources set out in a-d above, for the purposes set out in this Policy.

2. What personal information do we use?

We may collect, store and otherwise process the following kinds of personal information:

- a. your name and contact details including postal address, telephone number, email address and, where applicable, social media identity;
- b. your position in an organisation, and information related to the work that you do there;
- c. your financial information, such as bank details and/ or credit/ debit card details, account holder name, sort code and account number;
- d. history of our interactions with you;
- e. details about your use of our products and services;
- f. information about your computer/ mobile device and your visits to and use of this website, including, for example, your IP address and geographical location;
- g. details of your qualifications/ experience;

and/ or

any other personal information which we obtain as per section 1 of this Policy.

Do we process special categories of data?

The EU General Data Protection Regulation (“**GDPR**”) recognises certain categories of personal information as sensitive and therefore requiring more protection, for example information about your health, ethnicity and political opinions.

In certain situations, we may collect and/or use these special categories of data (for example, we may need to collect individuals’ health information in order to ensure that equal access is granted to our services). We will only process these special categories of data if there is a valid reason for doing so and where the GDPR allows us to do so.

3. How and why will we use your personal information?

Your personal information, however provided to us, will be used for the purposes specified in this Policy. In particular, we may use your personal information:

- a. to provide you with services, products or information you have requested NB this includes sending members information as part of their membership of HA;
- b. to provide further information about our work, services or activities (where necessary, and only where you have provided your consent to receive such information);
- c. to update you on the status of our services;
- d. to answer your questions/ requests and communicate with you in general;
- e. to manage relationships with our partners and service providers;
- f. to provide you with technical support;
- g. to analyse and improve our work, services, activities, products or information (including our website), or for our internal records;
- h. to report on the impact/effectiveness of our work;
- i. to run/administer our operations (including our website), keep them safe and secure and ensure that content is presented in the most effective manner for you and for your device;
- j. for publicity purposes (for example where we list examples of our work on our website);
- k. to audit and/ or administer our accounts;
- l. to satisfy legal obligations which are binding on us, for example in relation to regulatory, government and/ or law enforcement bodies with whom we may work (for example requirements relating to the payment of tax or anti-money laundering);
- m. for the prevention of fraud or misuse of services; and/or
- n. for the establishment, defence and/ or enforcement of legal claims.

4. Lawful bases

The GDPR requires us to rely on one or more lawful bases to use your personal information. We consider the grounds listed below to be relevant:

- a. Where you have provided your **consent** for us to use your personal information in a certain way (for example, we ask for your consent to use your personal information to send you our newsletter Heritage Update).
- b. Where necessary so that we can **comply with a legal obligation** to which we are subject (for example, where we are obliged to share your personal information with regulatory bodies which govern our work and services).
- c. Where **necessary for the performance of a contract** to which you are a party or to take steps at your request prior to entering a contract (for example, to provide you with subscriptions you have ordered).
- d. Where there is a **legitimate interest** in us doing so.

The GDPR allows us to collect and process your personal information if it is reasonably necessary to achieve our or others' legitimate interests (as long as that processing is fair, balanced and does not unduly impact your rights as an individual).

In broad terms, our "legitimate interests" means the interests of running HA as a national charity working with Government, Historic England and other partners to help our members achieve an improved environment for England's heritage; for example, communicating with you regularly so that we can help you understand the key challenges facing the sector and to enable you to feed into our work, involving members in our advocacy groups or providing examples and case studies to Government or others.

When we process your personal information to achieve such legitimate interests, we consider and balance any potential impact on you (both positive and negative), and on your rights under data protection laws. We will not use your personal information for activities where our interests are overridden by the impact on you, for example where use would be excessively intrusive (unless, for instance, we are otherwise required or permitted to by law).

5. Communications for marketing/promotional purposes

We may use your contact details to provide you with information about our work, events, services and/ or products which we consider may be of interest to you (for example, about events you previously attended, or updates about new products we have developed which are relevant to you or your organisation).

For non HA members, where we do this via email, SMS or telephone, we will not do so without your prior consent (unless allowed to do so via applicable law).

Where you have provided us with your consent previously but do not wish to be contacted by us policy@theheritagealliance.org.uk. You can opt out of receiving Heritage Update newsletter emails from us at any time by clicking the "unsubscribe" link at the bottom of our emails.

6. Children's personal information

When we process children's personal information, where required we will not do so without their consent or, where required, the consent of a parent/ guardian. We will always have in place appropriate safeguards to ensure that children's personal information is handled with due care.

7. Donations

When you use our secure online donation function you will be directed to a specialist payment services provider who will receive your financial information to process the transaction. We will provide your personal information to the payment services provider only to the extent necessary for the purpose of processing your donation.

8. How long do we keep your personal information?

In general, unless still required in connection with the purpose(s) for which it was collected and/or processed, we remove your personal information from our records six years after the date it was collected. However, if before that date (i) your personal information is no longer required in connection with such purpose(s), (ii) we are no longer lawfully entitled to process it or (iii) you validly exercise your right of erasure (please see Section 11 below), we will remove it from our records at the relevant time.

If you request to receive no further contact from us, we will keep some basic information about you on our suppression list in order to comply with your request and avoid sending you unwanted materials in the future.

9. Will we share your personal information?

We do not share, sell or rent your personal information to third parties for marketing purposes. However, in general we may disclose your personal information to selected third parties in order to achieve the purposes set out in this Policy.

These parties may include (but are not limited to):

- a. suppliers and sub-contractors for the performance of any contract we enter into with them, for example IT service providers such as website hosts or cloud storage providers;
- b. our partner organisations;
- c. banks;
- d. financial companies that process payments on our behalf;
- e. social media platforms;
- f. professional service providers such as accountants and lawyers;
- g. parties assisting us with research to monitor the impact/effectiveness of our services; and
- h. regulatory authorities, such as tax authorities.

In particular, we reserve the right to disclose your personal information to third parties:

- in the event that we sell or buy any business or assets, in which case we will disclose your personal information to the (prospective) seller or buyer of such business or assets;
- if substantially all of our assets are acquired by a third party, personal information held by us may be one of the transferred assets;
- if we are under any legal or regulatory duty to do so; and/or

- to protect the rights, property or safety of HA, its personnel, users, visitors or others.

10. Security/ storage of and access to your personal information

HA is committed to keeping your personal information safe and secure and we have appropriate and proportionate security policies and organisational and technical measures in place to help protect your information.

Your personal information is only accessible by appropriately trained staff, volunteers and contractors, and stored on secure servers which have features to prevent unauthorised access.

11. International Data Transfers

Given that we are a UK-based organisation, we will normally only transfer your personal information within the UK or European Economic Area (“**EEA**”), where all countries have the same level of data protection law as under the GDPR.

However, because we may use agencies and/or suppliers to process personal information on our behalf, it is possible that personal information we collect from you will be transferred to and stored in a location outside the EEA).

Please note that some countries outside of the EEA have a lower standard of protection for personal information, including lower security requirements and fewer rights for individuals. Where your personal information is transferred, stored and/or otherwise processed outside the EEA in a country that does not offer an equivalent standard of protection to the EEA, we will take all reasonable steps necessary to ensure that the recipient implements appropriate safeguards (such as by entering into standard contractual clauses authorised by the European Commission) designed to protect your personal information and to ensure that your personal information is treated securely and in accordance with this Policy. If you have any questions about the transfer of your personal information, please contact us using the details below.

Unfortunately, no transmission of your personal information over the internet can be guaranteed to be 100% secure – however, once we have received your personal information, we will use strict procedures and security features to try and prevent unauthorised access.

12. Exercising your Rights

Where we rely on your consent to use your personal information, you have the right to withdraw that consent at any time. This includes the right to ask us to stop using your personal information for marketing or fundraising purposes or to unsubscribe from our email list at any time. You also have the following rights:

- a. **Right of access** – you can write to us to ask for confirmation of what personal information we hold on you and to request a copy of that personal information. Provided we are satisfied that you are entitled to see the personal information requested and we have successfully confirmed your identity, we will provide you with your personal information subject to any exemptions that apply.
- b. **Right of erasure** – at your request we will delete your personal information from our records as far as we are required to do so. In many cases we would propose to suppress further communications with you, rather than delete it.

- c. **Right of rectification** – if you believe our records of your personal information are inaccurate, you have the right to ask for those records to be updated. You can also ask us to check the personal information we hold about you if you are unsure whether it is accurate/up to date.
- d. **Right to restrict processing** – you have the right to ask for processing of your personal information to be restricted if there is disagreement about its accuracy or legitimate usage.
- e. **Right to object** – you have the right to object to processing where we are (i) processing your personal information on the basis of the legitimate interests basis (see section 4 of this Policy), (ii) using your personal information for direct marketing or (iii) using your information for statistical purposes.
- f. **Right to data portability** – to the extent required by the GDPR, where we are processing your personal information (that you have provided to us) either (i) by relying on your consent or (ii) because such processing is necessary for the performance of a contract to which you are party or to take steps at your request prior to entering into a contact, and in either case we are processing using automated means (i.e. with no human involvement), you may ask us to provide the personal information to you – or another service provider – in a machine-readable format.

Rights related to automated decision-making – you have the right not to be subject to a decision based solely on automated processing of your personal information which produces legal or similarly significant effects on you, unless such a decision (i) is necessary to enter into/performance a contract between you and us/another organisation; (ii) is authorised by EU or Member State law to which we are subject (as long as that law offers you sufficient protection); or (iii) is based on your explicit consent. Please note that some of these rights only apply in limited circumstances. For more information, we suggest that you contact us using the details in paragraph 14 below.

We encourage you to raise any concerns or complaints you have about our data processing by contacting us using the details provided in paragraph 14 below. You are further entitled to make a complaint to the Information Commissioner's Office – www.ico.org.uk. For further information on how to exercise this right, please contact us using the details below.

13. Changes to this Policy

We may update this Policy from time to time. We will notify you of significant changes by contacting you directly where reasonably possible for us to do so and by placing an update Policy on our website. This Policy was last updated on 25th May 2018

14. Links and third parties

We link our website directly to other sites and provide links to other sites in emails. This Policy **does not** cover external websites and **we are not responsible** for the privacy practices or content of those sites. We encourage you to read the privacy policies of any external websites you visit via links on our website.

15. How to contact us

Please let us know if you have any questions or concerns about this Policy or about the way in which we process your personal information by contacting us at the channels below. Please ask for / mark messages for the attention of Joe O'Donnell, information security officer.

Email: policy@theheritagealliance.org.uk

Telephone 0207 233 0700

Post: Information security officer