

Title:	Fundraising Privacy Policy
Type:	Policy and Procedure
Group:	Fundraising
Date:	2026 – 2029
Version:	2.0

Target audience (including bank, temporary, or agency colleagues)	
People who need to know this document in detail:	Fundraising Team
People who need to have a broad understanding of this document	Trustees, FR Volunteers
People who need to know that this document exists	All colleagues at CHF

Review frequency:	3 years
Next review process to start:	January 2029
This document will remain valid during the review process	

Lead:	Director of Specialist Services & Income
Support:	Head of Fundraising & Income

Version control:

Version No	New document or reasons for revision	Agreed by:	Date
1.0	New policy	Head of Fundraising	17/09/24
2.0	Reviewed	ELT	February 2026

Linked documents:

Privacy policy <https://chf.org.uk/privacy-policy/>
 Commitment to Donors
 All Policies, Procedures, Guidelines, Protocols for Chailey Heritage Foundation

Background

As part of Chailey Heritage Foundation, Registered Charity no. 1075837, the Fundraising Department is committed to ensuring your privacy. The privacy and security of your personal information is extremely important to us and this policy explains how we collect, use, and protect personal information provided by our supporters during fundraising activities.

We are committed to being transparent about how your data is handled and ensuring it is used responsibly, in compliance with data protection laws and ethical fundraising standards. Our goal is to safeguard your privacy while enabling us to raise funds effectively to support our charitable mission.

We will only store and use your personal data in accordance with The General Data Protection Regulation (GDPR).

This policy applies to anyone working for Chailey Heritage Foundation (CHF). This includes colleagues, bank workers, contractors, volunteers, and apprentices.

In accordance with the Equality & Diversity policy, this policy & procedure will not discriminate, against anyone based on their age, disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

What data we collect

We will collect personal data provided by you when you make a donation, support an event, volunteer or fundraise for us or interact with us about fundraising. This will include information that you have supplied to us such as your name and address, email address, telephone number, mobile number, communication preferences and interests. If you donate to us, then we'll keep records of when and how much you gave and whether to a particular campaign.

We may receive information from third parties such as JustGiving, Enthuse or CAF Donate and links to other sites. They will ask for your consent so please check their privacy policy to see how they process your data. We are not responsible for the privacy practices or content of linked websites.

What we do with your data and the lawful basis of processing information:

We use your information when it is in our legitimate interest, for example, to process donations, and claim gift aid if applicable. We also like to send you a letter of thanks.

We also use this information where it is in our legitimate interest as fundraisers to keep in touch with you about the work of Chailey Heritage Foundation, its Fundraising activities and events. We will only communicate with you in the way that you have chosen.

In some cases, we rely on your consent. For example, where you sign up to receive newsletters or other marketing communications, we will process your information on the basis of your consent. You may withdraw your consent at any time.

We may also process your personal information where this is necessary for the performance of a contract with you, or in order to take steps at your request before entering into a contract. This includes, for example, where you participate in the Chailey Heritage Foundation lottery, register for, purchase tickets for, or otherwise take part in one of our events or activities.

In certain circumstances, we process your personal information to comply with our legal obligations. For example, where you make a Gift Aid declaration, we use the relevant information to make Gift Aid claims to HM Revenue & Customs and to maintain records required for tax and regulatory purposes.

Who we share your data with

We will only share your data with organisations we work with when it is necessary, or when we are legally required to do so, and the privacy and security of your data is assured. For example, this could be to assist organisers in the efficient delivery of events, to allow our database provider to maintain our CRM system, or to interact with HMRC so we can claim gift aid. We will never sell your personal data.

How we store and protect your data

We take the security of your personal data seriously and have appropriate technical and organisational measures in place to protect it against unauthorised access, loss, misuse or alteration.

For fundraising purposes, personal data is stored securely within:

- **Beacon CRM**, our fundraising and supporter relationship management system; and
- **Microsoft SharePoint**, which forms part of our Microsoft 365 environment.

Access to these systems is restricted to authorised staff and volunteers who require the information to carry out their role. Systems are protected through a combination of access controls, authentication measures, regular security updates, and monitoring.

Where data is processed by third-party suppliers, we ensure that appropriate contractual safeguards are in place and that suppliers meet UK GDPR and data protection standards.

Retention of Data

We will only use and keep your information for as long as it is required for the purposes it was collected for. It is important for us to keep historical records of all donations made should queries arise.

Telling us when things change

We want you to remain in control of your personal data. If, at any time, you no longer wish to receive information from us or you want to change the way we communicate with you, or you want us to amend or remove your personal data please:

CALL The Fundraising Team on 01825 724752 (open 9.00am to 5.00pm weekdays)

WRITE to The Fundraising Office at Chailey Heritage Foundation, Haywards Heath Road, North Chailey, Lewes, East Sussex, BN8 4EF

E-MAIL us on fundraising@chf.org.uk

Your individual rights

In this Section, we have summarised the rights that you have under General Data Protection Regulation. Some of the rights are complex, and not all the details have been included in our summaries. Accordingly, you should read the relevant laws and guidance from the regulatory authorities for a full explanation of these rights.

Your principal rights under General Data Protection Regulation are:

- Right to Object
- Right of Access
- Right to be informed
- Right to Rectification
- Right to Erasure
- Right to Restrict Processing
- Right to Data Portability

The right to object

You can exercise this right if

- Processing relies on legitimate interest
- Processing is for scientific or historical research
- Processing includes automated decision making and profiling
- Processing is for direct marketing purposes
- The right of access
 - You or any third party acting on your behalf with your authority may request a copy of the personal data we hold about you without charge.
 - We will ask to verify your identity or request evidence from the third party that they are acting on your behalf before releasing any personal data we hold about you.
- The right to be informed
- We are required, to provide clear and transparent information to you about how we process your personal data. This privacy notice addresses this right.
- The right of rectification
 - If you believe the personal data we hold about you is incorrect or incomplete you have the right to correct this and you may exercise this right along with the right to restrict processing until these corrections are made.
- The right to erasure
 - If there is no legal basis or legitimate reason for processing your personal data, you may request that we erase it.

- The right to restrict processing
 - You may ask us to restrict the processing of your personal data. This means we will still hold it but not process it. This is a conditional right which may only be exercised when:
 - Processing is unlawful
 - We no longer need the personal data, but it is required for a legal process
 - You have exercised your right to object to processing and require processing to be halted while a decision on the request to object is made.
 - If you are exercising your right to rectification
- The right to data portability
 - You can request that your personal data is transferred to another controller or processor in a machine-readable format if:
 - Processing is based on consent
 - Processing is by automated means (i.e. not paper based)
 - Processing is necessary for the fulfilment of a contractual obligation

If you would like to make a data subject right request, please write to DPO, Chailey Heritage Foundation, Haywards Heath Road, North Chailey, East Sussex BN8 4EF or email: dpo@chf.org.uk.

Consent

Where you have given consent for processing, or explicit consent in relation to the processing of special category data, you have the right to withdraw this consent at any time, but this will not affect the lawfulness of processing based on consent before its withdrawal.

Automated Decision Making

Your personal data is not used in any automated decision making (a decision made solely by automated means without any human involvement) or profiling (automated processing of personal data to evaluate certain conditions about an individual).

Transfers Outside Of the UK

In this section, we provide information about the circumstances in which your personal data may be transferred and stored in countries outside the United Kingdom (UK).

We may share personal information to third parties outside of the United Kingdom. Any personal information transferred will only be processed on our instruction and we ensure that information security



at the highest standard would be used to protect any personal information as required by the Data Protection laws.

Where personal data is transferred outside of the UK to a country without an adequacy decision, we will ensure appropriate safeguards are in place prior to the transfer. These could include:

EU Standard Contractual Clauses + UK Addendum
Binding Corporate Rules
An exception as defined in Article 49 of the EU GDPR

What to do if you have a complaint

In the first instance, please talk to us directly so we can resolve any problem or query. You can also contact our Data Protection Officer dpo@chf.org.uk.

You also have the right to contact the Information Commissioner's Office (ICO) if you have any questions about Data Protection. You can contact them using their help line 0303 123 113 or at <https://ico.org.uk/make-a-complaint/>

Policy Review and Amendments

We keep this Policy under regular review.

We reserve the right to update this privacy notice at any time, and we will provide you with a new privacy notice when we make any substantial updates. We may also notify you in other ways from time to time about the processing of your personal information.

Cookie usage information

Please refer to the separate [Cookie Policy](#) for more information.