DATA PROTECTION POLICY

Reviewed by: Kelly Hall
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Reviewed by: Kelly Hall
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Next Review Date: September 2027

1. Purpose of the policy

1.1. Somerset Community Foundation (SCF) is committed to complying with privacy and data protection laws including:

- the General Data Protection Regulation ("the GDPR") and any related legislation which applies in the UK, including, without limitation, any legislation derived from the Data Protection Act 2018;
- the Privacy and Electronic Communications Regulations (2003) and any successor or related legislation, including without limitation, E-Privacy Regulation 2017/0003;
- the Data (Use and Access) Act 2025, which has amended the UK GDPR and PECR, including introducing a new soft opt-in exemption for charities described in section 13 of this policy; and
- all other applicable laws and regulations relating to the processing of personal data and privacy, including statutory instruments and, where applicable, the guidance and codes of practice issued by the Information Commissioner's Office ("ICO") or any other supervisory authority.

(together **"the Legislation"**)

1.2. This policy sets out what we do to protect individuals' personal data.

1.3. All staff, trustees, volunteers and associates who handle personal data in any way on behalf of SCF must ensure that we comply with this policy. Section 3 of this policy describes what comes within the definition of "personal data". Any breach of this policy will be taken seriously and may result in disciplinary actions.

1.4. This policy may be amended from time to time to reflect any changes in legislation, regulatory guidance or internal policy decisions.

2. About the policy

2.1. The types of personal data that we may handle include details of:

- donors, trustees, volunteers, beneficiaries, staff, supporter, other stakeholders.

2.2. The Operations & Resources Director is the data protection officer at Somerset Community Foundation and is responsible for ensuring compliance with the GDPR and with this policy. Any questions or concerns about this policy should be referred in the first instance to them.

3. Definitions of data protection terms

3.1. The following terms will be used in this policy and are defined below:

3.2. **Data Subjects** include all living individuals about whom we hold personal data, for instance an employee or a supporter. A data subject need not be a UK national or resident. All data subjects have legal rights in relation to their personal data.

3.3. **Personal Data** means any information relating to a living person who can be identified directly or indirectly from that information (or from that information and other information in our possession). Personal data can be factual (such as a name, address or date of birth) or it can be an opinion (such as a performance appraisal). It can also include an identifier such as an identification number, location data, an online identifier specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that person.

3.4. **Data Controllers** are the people who, or organisations which, decide the purposes and the means for which, any personal data is processed. They have a responsibility to process personal data in compliance with the Legislation. Somerset Community Foundation is the data controller of all personal data that we manage in connection with our work and activities.

3.5. **Data Processors** include any person who processes personal data on behalf of a data controller. Employees of data controllers are excluded from this definition but it could include other organisations such as website hosts, data entry companies, marketing distribution companies or other service providers which handle personal data on our behalf.

3.6. **European Economic Area** includes all countries in the European Union as well as Norway, Iceland and Liechtenstein.

3.7. **ICO** means the Information Commissioner's Office (the authority which oversees data protection regulation in the UK).

3.8. **Processing** is any activity that involves use of personal data, whether or not by automated means. It includes but is not limited to:

- collecting;
- recording;
- organising;
- structuring;
- storing;
- adapting or altering;
- retrieving;
- disclosing by transmission;
- disseminating or otherwise making available;
- alignment or combination;

- restricting;
- erasing; or
- destruction of personal data.

3.9. Sensitive Personal Data (which is defined as "special categories of personal data" under the GDPR) includes information about a person's:

- racial or ethnic origin;
- political opinions;
- religious, philosophical or similar beliefs;
- trade union membership;
- physical or mental health condition;
- sexual life or orientation;
- genetic data;
- biometric data; and
- such other categories of personal data as may be designated as "special categories of personal data" under the Legislation.

4. Data protection principles

4.1. Anyone processing personal data must comply with the six data protection principles set out in the GDPR. We are required to comply with these principles (summarised below), and show that we comply, in respect of any personal data that we deal with as a data controller.

4.2. Personal data should be:

- processed fairly, lawfully and transparently;
- collected for specified, explicit and legitimate purposes and not further processed in a way which is incompatible with those purposes;
- adequate, relevant and limited to what is necessary for the purpose for which it is held;
- accurate and, where necessary, kept up to date;
- not kept longer than necessary; and
- processed in a manner that ensures appropriate security of the personal data.

5. Processing data fairly and lawfully

5.1. The first data protection principle requires that personal data is obtained fairly and lawfully and processed for purposes that the data subject has been told about. Processing

will only be lawful if certain conditions can be satisfied, including where the data subject has given consent, or where the processing is necessary for one or more specified reasons, such as where it is necessary for the performance of a contract.

5.2. To comply with this principle, every time we receive personal data about a person directly from that individual, which we intend to keep, we need to provide that person with "the fair processing information". We will refer them to the Privacy Statement, made available on our website, to tell them:

- the type of information we will be collecting (categories of personal data concerned);
- who will be holding their information, i.e. Somerset Community Foundation including contact details and the contact details of our Data Protection Officer (if we have one);
- why we are collecting their information and what we intend to do with it for instance to process donations or send them mailing updates about our activities;
- the legal basis for collecting their information (for example, are we relying on their consent, or on our legitimate interests or on another legal basis);
- if we are relying on legitimate interests as a basis for processing what those legitimate interests are;
- whether the provision of their personal data is part of a statutory or contractual obligation and details of the consequences of the data subject not providing that data;
- the period for which their personal data will be stored or, where that is not possible, the criteria that will be used to decide that period;
- details of people or organisations with whom we will be sharing their personal data;
- if relevant, the fact that we will be transferring their personal data outside the EEA and details of relevant safeguards; and
- the existence of any automated decision-making including profiling in relation to that personal data.

5.3. Where we obtain personal data about a person from a source other than the person his or her self, we must provide that individual with the following information in addition to that listed under 5.2 above:

- the categories of personal data that we hold; and
- the source of the personal data and whether this is a public source.

5.4. In addition, in both scenarios, (where personal data is obtained both directly and indirectly) we must also inform individuals of their rights outlined in section 9 below, including the right to lodge a complaint with the ICO and, the right to withdraw consent to the processing of their personal data.

5.5. This fair processing information can be provided in a number of places including on web pages, in mailings or on application forms. We must ensure that the fair processing information is concise, transparent, intelligible and easily accessible.

6. Processing data for the original purpose

6.1. The second data protection principle requires that personal data is only processed for the specific, explicit and legitimate purposes that the individual was told about when we first obtained their information.

6.2. This means that we should not collect personal data for one purpose and then use it for another. If it becomes necessary to process a person's information for a new purpose, the individual should be informed of the new purpose beforehand. For example, if we collect personal data such as a contact number or email address in order to update a person about our activities, it should not then be used for any new purpose — for example, to share it with other organisations for marketing purposes — without first getting the individual's consent, unless a specific exemption applies (see section 13).

7. Personal data should be adequate and accurate

7.1. The third and fourth data protection principles require that personal data that we keep should be accurate, adequate and relevant. Data should be limited to what is necessary in relation to the purposes for which it is processed. Inaccurate or out-of-date data should be destroyed securely, and we must take every reasonable step to ensure that personal data which is inaccurate is corrected.

8. Not retaining data longer than necessary

8.1. The fifth data protection principle requires that we should not keep personal data for longer than we need to for the purpose it was collected for. This means that the personal data that we hold should be destroyed or erased from our systems when it is no longer needed. If you think that we are holding out-of-date or inaccurate personal data, please speak to the data officer.

8.2. For guidance on how long particular types of personal data that we collect should be kept before being destroyed or erased, please contact the data officer or seek legal advice.

9. Rights of individuals under the GDPR

9.1. The GDPR gives people rights in relation to how organisations process their personal data. Everyone who holds personal data on behalf of Somerset Community Foundation needs to be aware of these rights. They include (but are not limited to) the right:

- to request a copy of any personal data that we hold about them (as data controller), as well as a description of the type of information that we are processing, the uses that are being made of the information, details of anyone to whom their personal data has been disclosed, and how long the data will be stored (known as subject access rights);

- to be told, where any information is not collected from the person directly, any available information as to the source of the information;

- to be told of the existence of automated decision-making;

- to object to the processing of data where the processing is based on either the conditions of public interest or legitimate interests;

- to have all personal data erased (the right to be forgotten) unless certain limited conditions apply; to restrict processing where the individual has objected to the processing;

- to have inaccurate data amended or destroyed; and

- to prevent processing that is likely to cause unwarranted substantial damage or distress to themselves or anyone else.

10. Data Security

10.1. The sixth data protection principle requires that we keep secure any personal data that we hold.

10.2. We are required to put in place procedures to keep the personal data that we hold secure, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures.

10.3. When we are dealing with sensitive personal data, more rigorous security measures are likely to be needed — for instance, if sensitive personal data (such as details of an individual's health, race or sexuality) is held on a memory stick or other portable device, it should always be encrypted.

10.4. When deciding what level of security is needed, your starting point should be to look at whether the information is sensitive or highly confidential and how much damage could be caused if it fell into the wrong hands.

10.5. The following security procedures and monitoring processes must be followed in relation to all personal data processed by us:

- measures to restore availability and access to data in a timely manner in the event of a physical or technical incident;
- a process for regularly testing, assessing and evaluating the effectiveness of security measures;
- backing up data to the cloud;
- data must be processed and stored securely in accordance with our IT Policy;
- entry controls (any stranger seen in entry-controlled areas should be reported);
- desks and cupboards should be kept locked if they hold confidential information of any kind (personal information is always considered confidential); and
- staff must keep data secure when travelling or using it outside the offices.

11. Transferring Data Outside the EEA

11.1. The GDPR requires that when organisations transfer personal data outside the EEA, they take steps to ensure that the data is properly protected.

11.2. The European Commission has determined that certain countries provide an adequate data protection regime. These countries currently include Andorra, Argentina, Canada, Guernsey, Isle of Man, Israel, New Zealand, Switzerland, Faroe Islands, Jersey and Uruguay, but this list may be updated.

11.3. As such, personal data may be transferred to people or organisations in these countries without the need to take additional steps beyond those you would take when sharing

personal data with any other organisation. In transferring personal data to other countries outside the EEA (which are not on this approved list), it will be necessary to enter into an EC-approved agreement, seek the explicit consent of the individual, or rely on one of the other derogations under the GDPR that apply to the transfer of personal data outside the EEA.

11.4. Specific advice should be sought from the data protection officer before transferring personal data to organisations outside the EEA, particularly where no adequacy decision applies.

11.5. For more information, please speak to the data protection officer or seek further legal advice.

12. Processing sensitive personal data

12.1. On some occasions we may collect information about individuals that is defined by the GDPR as special categories of personal data, and special rules will apply to the processing of this data. In this policy we refer to "special categories of personal data" as "sensitive personal data". The categories of sensitive personal data are set out in the definition in section 3.9.

12.2. Purely financial information is not technically defined as sensitive personal data by the GDPR. However, particular care should be taken when processing such data, as the ICO will treat a breach relating to financial data very seriously.

12.3. In some cases, in order to process sensitive personal data, we must obtain explicit consent from the individuals involved. As with any other type of information, we will also have to be absolutely clear with people about how we are going to use their information.

12.4. It is not always necessary to obtain explicit consent. There are a limited number of other circumstances in which the GDPR permits organisations to process sensitive personal data. If you are concerned that you are processing sensitive personal data and are not able to obtain explicit consent for the processing, please speak to the data protection officer.

13. Electronic marketing and the charitable purposes soft opt-in

13.1. The Privacy and Electronic Communications Regulations (PECR) generally require us to have an individual's consent before sending them electronic marketing (such as emails, texts or direct messages on social media), unless a specific exemption applies.

13.2. Since 5 February 2026, the Data (Use and Access) Act 2025 has introduced a new exemption known as the "charitable purposes soft opt-in". This allows registered charities, including SCF, to send electronic marketing messages without the recipient's prior consent, provided that all of the following conditions are met:

- the sole purpose of the message is to further one or more of SCF's charitable purposes (for example, fundraising appeals, volunteering requests, or updates about our funding programmes) — it must not be used to promote another organisation or for purely commercial purposes;
- SCF obtained the person's contact details directly from them, not from a third party;
- the person has actively expressed interest in, or offered or provided support to, SCF's charitable purposes — for example, by donating, volunteering, taking out a membership, or paying to attend a fundraising event. Simply having received funding or support from SCF, without any other active engagement, is not on its own enough to rely on this exemption;
- the contact details were obtained on or after 5 February 2026 — the exemption cannot be applied retrospectively to contacts already on our records before that date; and

- the person is given a clear and simple way to opt out of receiving marketing, both when their details are first collected and in every marketing message sent to them afterwards, and any opt-out is honoured promptly.

13.3. Even where these conditions are met, we must still identify a lawful basis for the processing under the UK GDPR (see section 5). Where we are not relying on consent, this is likely to be legitimate interests, and a Legitimate Interests Assessment (LIA) should be completed and documented before relying on this basis.

13.4. Before using the soft opt-in, the data protection officer will confirm how it applies to our supporter base and will maintain separate records of: (a) people who should not receive marketing; (b) people who have given explicit consent to marketing; and (c) people contacted only in reliance on the soft opt-in.

13.5. Where we rely on the soft opt-in, this must be clearly explained in our Privacy Statement and at the point personal data is collected, so that people understand why they may receive marketing from us.

13.6. Particular care should be taken where the person concerned may be a person we support through our funding programmes, as they may be in a more vulnerable position than a general supporter; the appropriateness of marketing to this group should be specifically considered as part of the LIA referred to in clause 13.3.

14. Notification

14.1. We recognise that, whilst there is no obligation for us to make an annual notification to the ICO under the GDPR, we will consult with the ICO where necessary when we are carrying out "high risk" processing.

14.2. We will report breaches (other than those which are unlikely to be a risk to individuals) to the ICO and the Charity Commission where necessary, within 72 hours. We will also notify affected individuals where the breach is likely to result in a high risk to the rights and freedoms of those individuals.

15. Monitoring and review of the policy

15.1. This policy is reviewed annually by our board of trustees to ensure that it is achieving its objectives.