



## **HELOA PRIVACY NOTICE FOR MEMBERS**

### **Purpose of this Privacy Notice**

This privacy notice covers personal data and information for individual members of HELOA. It outlines how HELOA collects, shares and uses personal data and informs you of your rights with regards to the information we hold.

### **Data Collection and Privacy Notice**

HELOA processes personal data as a “Data Controller” on behalf of their members, partners and speakers, as defined in the Data Protection Act 2018 (“the DPA”) and the General Data Protection Regulation (Regulation (EU) 2016/679) (“the GDPR”).

This notice relates to information about you, which will be collected by HELOA and processed as described below. This notice may be updated at any time.

Your personal data will be processed in compliance with current data protection legislation including the Data Protection Act 2018, and the General Data Protection Regulation (GDPR), which came into force on 25<sup>th</sup> May 2018.

### **What we collect**

We collect or use the following information to provide services and goods, including delivery and third party referrals:

- Name and contact details
- Pronoun preferences (optional for event bookings)
- Name of institution
- Job title
- Work address
- Work email address
- Work telephone number

- Photographs or video recordings (for the website, marketing materials and/or socials)
- Health information (including medical conditions, allergies and medical requirements, (for the purposes of supporting event planning and delegate access needs only)
- Dietary information (including allergies and health conditions for the purposes of attending HELOA events only)
- Information about care needs (including disabilities, dietary requirements and general care provisions only if required to support delegate event attendance)
- Information about support requirements (only if required for the purposes of supporting event planning and delegate access needs)
- Records of meetings and decisions (meeting attendance records and comments and questions raised)
- Payment details (bank information for payment of speaker/ supplier expenses)

### **How do we collect your data?**

We will receive the data directly from you through your membership application, national and/or group event bookings and speaker bookings.

### **Retention**

We will retain personal data in order to keep in touch with our members for as long as necessary or unless you withdraw consent or do not renew your membership. When membership ceases, data will be deleted from the central Customer Relationship Management (CRM) system and mailing lists, as soon as possible once the office has been informed. Group data will be updated regularly, with no data being kept for longer than 1 year. HELOA financial data will be retained for 6 years and HELOA conference bookings will be retained for up to 3 years after the event.

### **How we use your data**

We collect personal data in order to keep in touch with you and to provide information that may benefit your membership. We do not, for this purpose collect any special categories of data relating, for example, to disability or ethnic background. Only if you are attending a group or national event, we may ask for special category data to support all individual and

organisational event requirements, including health information such as allergies, disabilities, health requirements and dietary requirements.

The information you provide may be used by HELOA to contact you with regards to, membership, events, training, meetings and sector updates. It is recognised that individuals may wish to opt out of receiving specific communications and can do so by completing the [HELOA Privacy Preferences Form](#).

As part of the HELOA processes we are required to share your data with appropriate individuals within the organisation and some external processors. HELOA has taken the necessary action to ensure access to this data is secure and only available to the appropriate committee members and processors. A full list of the reasons for using your personal information is given in **Table 1** and shows the legal basis that we use for processing your information.

### **Who we share your information with**

- HELOA Committee members - on a need to know basis in relation to membership, groups, training, finance, governance and communications
- Edge Hill University - storage of contact details and documents for editing and printing purposes, accessible by HELOA office staff and relevant Edge Hill University staff
- Dynamics - storage of membership details
- Mailchimp - communications with members
- Jiscmail - communications with specific groups of members
- Google - storage of membership details, collecting membership, bookings and feedback details and communications with members
- External auditor - accounting
- Sage Accounting - accounting

A full list of the different organisations that HELOA may share your data with is given in **Table 2**.

### **Sharing information outside the UK**

Where necessary, we may transfer personal information outside of the UK. When doing so, we comply with the UK GDPR, making sure appropriate safeguards are in place. For further

information or to obtain a copy of the appropriate safeguard for any of the transfers below, please use the links in Table 3 or contact us using the contact details provided. See **Table 3** for full details.

### **Your rights**

Under the current UK data protection legislation, you have certain rights over how your data is processed, including the right to know what information is processed about you and how it is processed. This legislation provides you with the right of access to your personal information. Additionally, you have the right to rectify inaccurate information; restrict processing; and object to processing. These rights are limited in certain circumstances so as to ensure compliance with other legal and statutory obligations, for example where data is processed for research or statistical purposes. Further data about these rights can be found on the [Information Commissioner's Office website](#).

You have the right to know what information HELOA holds about you. To obtain this information from HELOA, you must submit a subject access request in writing. For further details on how to do this, see the [HELOA Subject Access Request Policy](#).

### **HELOA Contact details**

HELOA Office, Edge Hill University,  
St Helens Road,  
Ormskirk,  
Lancashire,  
L39 4QP

**Email:** [office@heloac.ac.uk](mailto:office@heloac.ac.uk)

**Telephone:** 01695 654 392

### **How to complain**

If you have any concerns about our use of your personal data, you can make a complaint to us using the contact details above. If you remain unhappy with how we've used your data after raising a complaint with us, you can also complain to the ICO.

Information Commissioner's Office (ICO)

Wycliffe House

Water Lane

Wilmslow

Cheshire

SK9 5AF

Helpline number: 0303 123 1113

Website: <https://www.ico.org.uk/make-a-complaint>

### **Changes to the Privacy Notice**

We regularly review this policy and will update it if there are changes in how we manage or use your data.

**Table 1 - How HELOA may use your information**

Purpose	Legal Basis
<b>Membership</b> <ul style="list-style-type: none"> <li>• Administer your HELOA membership</li> <li>• Create membership profile on Dynamics</li> <li>• Create and share individual membership number</li> <li>• Add as subscriber to newsletter and relevant group mailing lists</li> </ul>	Consent Contract
<b>Membership Engagement</b> <ul style="list-style-type: none"> <li>• Track and analyse group and national meeting and event attendance</li> <li>• Track and analyse group and national election voting</li> <li>• Track and analyse individual, institutional and group numbers</li> <li>• Use membership engagement data to identify trends and insights to help improve HELOA's offering</li> </ul>	Consent Legitimate interest
<b>Groups</b> <ul style="list-style-type: none"> <li>• Review membership of meeting and event bookings</li> <li>• Log meeting and event attendance</li> <li>• Support vetting role applicants to ensure they are group members</li> <li>• Support primary contact voting in group elections</li> <li>• Process mentoring scheme</li> </ul>	Consent Contract
<b>Finance</b> <ul style="list-style-type: none"> <li>• Hold institutional contact and finance details for membership invoicing</li> <li>• Facilitate payment of committee members' expenses for HELOA business</li> <li>• Facilitate payment of member speaker expenses for group and national events</li> </ul>	Consent Contract Legal obligation
<b>Elections, recruitment, selection &amp; resignations</b> <ul style="list-style-type: none"> <li>• Process nominations and elections</li> <li>• Process appointed officer applications</li> <li>• Collect pre-application approval from line-managers</li> <li>• Provide applicant details to interview panels</li> <li>• Contact applicants regarding the status of their application</li> <li>• Onboarding and induction</li> </ul>	Consent Contract Legitimate interest

<ul style="list-style-type: none"> <li>• Administer newly elected and appointed committee members</li> <li>• Process resignations of committee members</li> </ul>	
Partnerships <ul style="list-style-type: none"> <li>• Store webinar delegate bookings</li> <li>• Support event planning</li> <li>• Support delegate attendance needs</li> </ul>	Consent Legitimate interest
National & Group Training <ul style="list-style-type: none"> <li>• Store delegate booking details</li> <li>• Support event planning</li> <li>• Support delegate attendance needs</li> </ul>	Consent Contract Legitimate interest
Members' learning and development <ul style="list-style-type: none"> <li>• Committee members' induction</li> <li>• Group mentoring schemes</li> <li>• Process Continued Professional Development (CPD UK) approval and certificates for accredited events (New Practitioners' Conference, Professional Development Conference and some group training sessions)</li> </ul>	Consent Contract Legitimate interest
Photographs & Recordings <ul style="list-style-type: none"> <li>• Committee members photographs are displayed on the committee members' and group committee pages of the website and on the structure charts</li> <li>• Speaker photo and bio shared on training pages, event programmes and event emails</li> <li>• Annual General Meeting (AGM) recording for the accuracy of the minutes</li> <li>• Online training session &amp; webinar recordings shared with members</li> <li>• Photographs and recordings of sessions and events used for marketing materials, socials and the website</li> </ul>	Consent Legitimate interest
Website <ul style="list-style-type: none"> <li>• Sharing committee details with members and external parties</li> <li>• Sharing training session and speakers' details</li> <li>• Event marketing</li> <li>• Session details, presentation materials and documentation storage</li> </ul>	Consent Legitimate interest

<p>Member communications - HELOA may use your personal data to contact you in regards to:</p> <p>1. Membership Details</p> <ul style="list-style-type: none"> <li>• Welcome email with membership details and number</li> <li>• Your institutional membership details and membership fees (Primary Contacts)</li> <li>• Financial remunerations with HELOA (Primary Contacts)</li> <li>• Your Primary Contact's details and role descriptor</li> </ul> <p>2. Information Sharing</p> <ul style="list-style-type: none"> <li>• Sector updates via email and social media</li> <li>• HELOA newsletter (Bulletin)</li> <li>• Promotion of partner, sponsor and supporters' events and updates</li> <li>• The HELOA annual awards</li> <li>• HELOA news via social media channels</li> <li>• Vacancies in the sector</li> </ul> <p>3. Governance</p> <ul style="list-style-type: none"> <li>• HELOA vacancies, role descriptors and the election and appointed processes</li> <li>• Voting opportunities and process</li> <li>• The HELOA Annual General Meeting (AGM) details, minutes and reports</li> <li>• HELOA policies, procedures and guidelines</li> <li>• Details of relevant data breaches and the mitigations taken</li> </ul> <p>4. Groups</p> <ul style="list-style-type: none"> <li>• Group welcome email</li> <li>• Group meeting and event details</li> <li>• Meeting minutes/ notes and documents</li> <li>• Group and partner updates</li> <li>• Group vacancies, role descriptors and the election process</li> <li>• Promotion of partner events and updates</li> </ul> <p>5. National Training</p> <ul style="list-style-type: none"> <li>• Training event details</li> <li>• Session notes, documents and presentations</li> <li>• Promotion of partner and sponsor sessions at events</li> </ul> <p>6. Surveys</p>	<p>Consent Legitimate interest</p> <p>Consent Legitimate interest</p> <p>Consent Legitimate interest Legal obligation</p> <p>Consent Legitimate interest</p> <p>Consent Legitimate interest</p>
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<ul style="list-style-type: none"> <li>• Facilitate the HELOA membership survey</li> <li>• Collection of feedback following group and national event attendance</li> </ul>	Consent Legitimate interest
<p>7. Rewards, benefits and wellbeing</p> <ul style="list-style-type: none"> <li>• Facilitate rewards - survey participation prizes, free event places</li> <li>• Facilitate benefits - sharing training, networking and event opportunities and details relating to HELOA membership</li> <li>• Facilitate wellbeing - sharing of online and in person wellbeing events supported by/ provided by HELOA</li> </ul>	Consent Legitimate interest
<p>8. Committee Roles</p> <ul style="list-style-type: none"> <li>• Share HELOA vacancies</li> <li>• Welcome email and term details</li> <li>• Submitted expenses, travel booking requests</li> </ul>	Consent Contract Legitimate interest

**Table 2 - List of organisations that HELOA may share your data with**

<b>Organisation/ Group</b>	<b>Purpose of the sharing the Information</b>	<b>Legal Basis</b>
Apps Vietutd	Send copy of form responses to form completer	Consent Legitimate interest
Barclays	Accounting	Legal obligation
Bick Accountants	Institutional and individual members' details & financial details	Legal obligation
Charity Commission for England and Wales	Trustee contact details	Legal obligation
CPD UK	Provides CPD accreditation for accredited training events	Consent Legitimate interest
Digital Inspiration	Send copy of form responses to form completer (does not retain HELOA data on their servers)	Consent Legitimate interest
Dynamics	Membership database - storage of membership details	Consent Contract
Edge Hill University Document Store	Downloading of contact details and documents for editing and printing purposes.	Consent Contract
Facebook	Sharing updates with members	Consent Legitimate interest
Google Drive	Storage of membership details, event bookings and feedback	Consent Contract
Google Forms	Collect contact details, booking details and feedback	Consent Contract Legitimate interest
Google Gmail	Communications with members	Consent Contract Legitimate interest

Instagram	Sharing updates and event details and promotion	Consent Legitimate interest
Jiscmail	Communications with specific groups of members	Consent Contract Legitimate interest
LinkedIn	Sharing updates and event details and promotion	Consent Legitimate interest
Mailchimp	Communications with members	Consent Legitimate interest
Sage Accounting	Accounting	Legal obligation
Wordpress (Website)	Event marketing, session details, presentation materials and documentation storage	Consent Legitimate interest
X	Sharing updates	Consent Legitimate interest
You Tube	Sharing updates, videos, marketing and event promotion	Consent Legitimate interest
Zoom	Online meetings and training events	Consent Legitimate interest

**Table 3 - Sharing information outside the UK**

<b>Organisation</b>	<b>Category of recipient</b>	<b>Country personal data is sent to</b>	<b>How the transfer complies with UK data protection law</b>
Apps Vietutd	Send copy of form responses to form completer	USA	<a href="#">Privacy Policy</a>
Digital Inspiration	Send copy of form responses to form completer (does not retain HELOA data on their servers)	USA	<a href="#">GDPR compliance</a>
Google	Email communications, data collection & storage Youtube - video content	USA	<a href="#">The country or sector has a UK data bridge (also known as Adequacy Regulations and Standard Contractual Clauses)</a>
Mailchimp	Email communications, data collection & storage Youtube - video content	USA	<a href="#">Addendum to the EU Standard Contractual Clauses (SCCs)</a>
Zoom	Video meeting platform	USA	<a href="#">Zoom and the European Union's General Data Protection Regulation (GDPR)</a>