



**HELOA PRIVACY NOTICE  
FOR PARTNERS & SPONSORS**

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**Purpose of this Privacy Notice**

This privacy notice covers personal data and information for partner and sponsor organisations who work with HELOA. It outlines how HELOA collects, shares and uses personal data from employers 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 ( (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 the following information:

- Name and contact details
- Pronoun preferences (optional for event bookings)

- Name of organisation
- Nature of your organisation
- Organisation website
- 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 partner/ sponsor access needs only)
- Dietary information (including allergies and health conditions for the purposes of supporting HELOA events only)
- Information about care needs (including disabilities, dietary requirements and general care provisions only if required to support partner/ sponsor event attendance)
- Information about support requirements (only if required for the purposes of supporting event planning and partner/ sponsor 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 enquiries to us (e.g. when you contact us to ask for information or a specific service), Sponsor Booking Form, Expression of Interest Form or via a public information source (contact details on your website).

### **Retention**

We will retain personal data in order to keep in touch with our partners and sponsors for as long as necessary or unless you withdraw consent or do not renew it when requested

during our periodic reviews of mailing lists. We will review our contacts databases and mailings lists every three years.

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

We collect personal data in order to keep in touch with you and to provide information. We do not, for this purpose collect any special categories of data relating, for example, to disability or ethnic background. Only if you are supporting 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, services that may benefit your organisation, such as for networking, events, or marketing opportunities. You can unsubscribe at any time from our emails, by clicking the 'Unsubscribe' link at the bottom of the email or, if you would like to be removed from our internal partnership and sponsors' database, you can contact the HELOA office at [office@heloac.ac.uk](mailto:office@heloac.ac.uk).

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, partnerships, sponsorship, 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
- Mailchimp - communications with members, partners and sponsors
- Jiscmail - communications with specific groups of members

- Google - storage of membership details, membership applications, delegate bookings, feedback and communications with members. Partner's and sponsors details, sponsorship details, agreements and communications.
- 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 information 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: [ICO website - 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**

<b>Purpose</b>	<b>Legal Basis</b>
<b>Partnership</b> <ul style="list-style-type: none"> <li>• Administer your HELOA partnership/ sponsorship</li> <li>• Create organisation profile in HELOA Google account</li> <li>• Add as subscriber to newsletter, where relevant</li> </ul>	Consent Contract
<b>Engagement</b> <ul style="list-style-type: none"> <li>• Track and analyse event attendance at partnership/ sponsored sessions and meetings locally and nationally</li> </ul>	Consent Legitimate interest
<b>Groups</b> <ul style="list-style-type: none"> <li>• Log meeting and event attendance at partnership/ sponsored sessions</li> <li>• Record of documents, membership feedback for group representation with partnerships/ sponsors, where applicable</li> </ul>	Consent Contract
<b>Finance</b> <ul style="list-style-type: none"> <li>• Hold organisational and or individual contact and finance details for invoicing, payment and auditing purposes</li> <li>• Facilitate payment of partners/ sponsors' expenses for HELOA business</li> </ul>	Consent Contract Legal obligation
<b>Partnerships</b> <ul style="list-style-type: none"> <li>• Store webinar details and documents</li> <li>• Support event planning</li> <li>• Support partners/ sponsor's attendance needs</li> </ul>	Consent Legitimate interest
<b>National &amp; Group Training</b> <ul style="list-style-type: none"> <li>• Store session details and documents</li> <li>• Support event planning</li> <li>• Support partners/ sponsor's attendance and session needs</li> </ul>	Consent Contract Legitimate interest
<b>Members' learning and development</b> <ul style="list-style-type: none"> <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
<b>Photographs &amp; Recordings</b>	Consent

Purpose	Legal Basis
<ul style="list-style-type: none"> <li>● Partner/ sponsor photo and bio may be shared on training pages, event programmes and event emails</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>	Legitimate interest
<p>Website</p> <ul style="list-style-type: none"> <li>● Sharing partners, sponsors and supporter's details</li> <li>● Sharing training session details including speakers, partners and sponsors</li> <li>● Event marketing</li> <li>● Session details, presentation materials and documentation storage</li> </ul>	Consent Legitimate interest
<p>Partner &amp; sponsor communications - HELOA may use your personal data to contact you in regards to:</p> <ol style="list-style-type: none"> <li>1. Partner/ Sponsor/ Supporter Details <ul style="list-style-type: none"> <li>● Welcome email with details</li> <li>● Your organisational partnership/ sponsorship/ supporter agreement with HELOA</li> <li>● Financial remunerations with HELOA</li> </ul> </li> <li>2. Information Sharing <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 supporter events and updates</li> <li>● The HELOA annual awards</li> <li>● HELOA news via social media channels</li> </ul> </li> <li>3. Governance <ul style="list-style-type: none"> <li>● HELOA policies, procedures and guidelines</li> <li>● Details of relevant data breaches and the mitigations taken</li> </ul> </li> <li>4. Groups <ul style="list-style-type: none"> <li>● Group meeting and event details including partner/ sponsor sessions</li> <li>● Meeting minutes/ notes and documents</li> <li>● Group and partner updates</li> </ul> </li> </ol>	<p>Consent Legitimate interest</p> <p>Consent Legitimate interest</p> <p>Consent Legitimate interest Legal obligation</p> <p>Consent Legitimate interest</p>

Purpose	Legal Basis
<ul style="list-style-type: none"> <li>● Promotion of partner/ sponsored 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> <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> <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>	<p>Consent Legitimate interest</p> <p>Consent Legitimate interest</p> <p>Consent Legitimate interest</p>

**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 Vietud	Send copy of form responses to form completer	Consent Legitimate interest
Barclays	Accounting	Legal obligation
Bick Accountants	Financial 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
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	Consent

<b>Organisation/ Group</b>	<b>Purpose of the sharing the Information</b>	<b>Legal Basis</b>
	promotion	Legitimate interest
Mailchimp	Communications with members	Consent Legitimate interest
Microsoft Teams	Online meetings and training events	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

**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 Vietud	Send copy of form responses back to form completer	USA	<a href="#">Privacy Policy</a>
Digital Inspiration	Send copy of form responses back 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	Communications with members	USA	<a href="#">Addendum to the EU Standard Contractual Clauses (SCCs)</a>
Microsoft Teams	Video meeting platform	USA	<a href="#">Security, compliance and privacy within Microsoft Teams</a>

*Updated April 2026 to include Microsoft Teams*