

## The William Leech Research Fund (WLRF)

### Privacy Notice

This Privacy Notice has been prepared by WLRF, a charity registered in England and Wales with charity registration number 1127350. Its sole trustee is the William Leech Foundation Limited, a private company limited by shares, incorporated in England with registration number 664118 and with charity registration number 232062.

All those to whom this Privacy Notice applies are referred to as **you** and **your** in this Privacy Notice and references to **we**, **us** or **our** refers to the WLRF.

The purpose of this Privacy Notice is to outline how WLRF handles personal information. It has been prepared to help you understand why and how we collect and use your personal information and what to do if you have any questions or complaints. It also gives you information about the rights you have in your personal information.

WLRF is a data controller. This means that we are responsible for deciding how and why we hold and use personal information about you, and for explaining this clearly to you.

WLRF holds personal data in compliance with its obligations under the EU General Data Protection Regulation (EU 2016/679) as incorporated into the laws of the United Kingdom (UK GDPR) and the Data Protection Act 2018 (DPA 2018).

The contact details for WLRF are as follows:

Address:           Bank Chambers  
                      26 Mosley Street  
                      Newcastle upon Tyne  
                      NE1 1DF

Telephone:       0191 232 7940

Email:             [\[marcia.lant@williamleechinvestments.co.uk\]](mailto:marcia.lant@williamleechinvestments.co.uk)

The person responsible for data protection is the Secretary and can be contacted at the above address.

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### THE PERSONAL INFORMATION WE COLLECT

This Privacy Notice is intended for those who apply to WLRF for research funding (**applicants**), those who contact us in relation to applications for funding (**potential applicants**), as well as those who are successful in receiving research funding from us (**research fellows and their host organisation(s)**), as well as other partners named in research applications. It also applies to visitors to the website and those who contact us or inform us (whether directly or through a research fellow) that they wish to be kept updated in relation to our events and our work (**wider interested parties**).

We will process personal information about you that you either provide to us directly, that we collect from you through our direct engagement with you, or that we receive from third parties. Information may be collected:

- (a) in the course of communications between you and us (including by phone, email or otherwise);

- (b) when you fill in forms for us, including the application for research funding and contact forms for our events and wider communications;
- (c) when you send in documents required to support your application for or to report on research conducted;
- (d) in relation to funding applications, from the host organisations through which your research is or will be carried out and/or your proposed or selected church or other partner(s); and
- (e) in relation to funding applications, from the referees for which you provide us with contact details.
- (f) in the case of wider interested parties, from research fellows where you have confirmed to the research fellow that you wish for your contact details to be passed to us

(collectively referred to in this privacy notice as 'you').

When personal information is collected by third party organisations directly from you and shared with us, you should be informed at the point of collection by those third parties that your personal information may be shared with us and combined with data collected from multiple sources (unless that third party is exempted from such a requirement). You should also be informed of the purposes for which that data is going to be used.

The personal information we collect will depend on our relationship with you and may include:

- (a) Full name;
- (b) Home address and/or business address;
- (c) Home, business and/or mobile telephone numbers;
- (d) Home and/or business email addresses;
- (e) Organisation and/or job role; and
- (f) Details of your interests in relation to the aims of WLRF.

We may also collect the following from applicants and research fellows:

- (a) Employment and academic history;
- (b) Details of your research interests and work or personal engagement with related organisations in the research field;
- (c) Any disability or related accessibility requirements for the purposes of making reasonable adjustments;
- (d) Contact information of your referees (title, name, address, email address, home telephone number and mobile telephone number);
- (e) Contact information of your host organisation; and
- (f) Any information necessary to ensure compliance with any statutory or regulatory requirement.

We do not intentionally collect any data from our website at present, nor set any cookies; if we use cookies on our website in future, we will add to the site a separate cookie policy and options relating to choices for visitors about cookies. Our website is provided by WordPress.org, so may be subject to their [Privacy Policy](#) and [Cookie Policy as detailed here](#).

Data we hold will be used confidentially, and to help us to deliver our projects or to fulfil legal or regulatory requirements if necessary.

Other than as we have set out in this Privacy Notice, we do not process any research data collected as part of research projects funded by WLRF. This data is collected and processed by the organisation holding the award, in accordance with their privacy notice(s).

### **THE THIRD PARTY INFORMATION WE COLLECT**

When applying for a research fellowship or (if successful) during the research fellowship, applicants may provide us with personal information relating to third parties (e.g. referees, others who are proposed to have a role within a research project)

We will use the personal information of those parties in accordance with this Privacy Notice and to the extent necessary to protect your legitimate interests and/or vital interests.

We may also, in order to ensure you receive the most appropriate support during your application and/or research, receive information about other persons from third parties (e.g. the academic host organisation and/or church or other partner organisation(s)). We will use that information in accordance with this Privacy Notice and to the extent necessary to protect your legitimate interests and/or vital interests, and to the extent necessary for our legitimate interest in providing the best possible support to you.

### **USING YOUR PERSONAL INFORMATION**

WLRF takes its obligations regarding your data very seriously and we have in place systems and processes to control how your data is processed.

For each of the purposes for which we process your personal information, we have set out the legal bases upon which we do so in the table below.

| <b>Purpose for processing your personal data</b>   | <b>Legal basis</b>   |
|--|--|
| To process and consider applicants' funding applications.  | This is in our legitimate interests in order to enable us to operate the research funding programme you have applied to. |
| To communicate with applicants and related parties about your funding application.   | This is in our legitimate interests in order to enable us to communicate with you effectively about your application.    |
| To communicate internally within WLRF (including our management committee) and to directors and staff of WLRF's trustee company, The William Leech Foundation Limited and also the directors and staff of William Leech (Investments) Limited, to discuss applications for research funding. | This is in our legitimate interests in order to enable us to operate the research funding programme you have applied to. |
| If applicants are successful in receiving funding, to process and provide to your host organisation the agreed funding relevant to your research.  | This is in our legitimate interests in order to provide funding to the host organisation in support of your research.    |

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| <p>If applicants are successful in receiving funding, to process and provide to your host organisation information necessary for the management of the research funding.</p>  | <p>This is in our legitimate interests in order to provide information to the host organisation to administer the research funding programme.</p>   |
| <p>To administer and monitor the use of research fellows' funding provided by WLRF.</p>   | <p>It is in our legitimate interests to share information with a research fellow's host organisation and/or church or other partner organisations, or any organisation acting in an employing or budget-holding capacity to whom the grant payment is made, for the purposes of, and compliance with the terms of the grant award.</p>            |
| <p>To communicate with third parties, including host organisations and partners and The William Leech Foundation Limited as sole trustee of WLRF, about the research project including award holders' progress and results.</p> | <p>This is in our legitimate interests in order to assess and evaluate the effectiveness of the research funding programme.</p>   |
| <p>To communicate with third parties about receipt and use of the funding.</p>  | <p>This is in our legitimate interests in order to publicly demonstrate how the WLRF is meeting its objectives, demonstrate the charity's public benefit, and administer the research funds.</p>  |
| <p>To publish, retain, share and disseminate research findings with interested third parties and the general public in line with WLRF's charitable aims.</p>  | <p>This is in our legitimate interests to meet our charitable aims.</p>   |
| <p>To seek your views and comments on our services.</p>   | <p>This is in our legitimate interests in order to improve the research funding programme.</p>  |
| <p>To notify you of changes to our services.</p>  | <p>This is in our legitimate interests in order to provide our services.</p>  |
| <p>To send you communications that you have requested.</p>  | <p>This is in both our legitimate interests in order to ensure that we provide you with appropriate information you require.</p> <p>Where you have provided us with your consent to communicate with you about activities of WLRF that we think may be of interest to you, your personal data will be processed on the basis of your consent.</p> |
| <p>To process and respond to your requests and enquiries.</p>   | <p>This is in our legitimate interests in order to provide our services.</p> <p>Where the information that we are processing is special category information, we may process that information for reasons of substantial public interest.</p>   |

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| <p>To monitor our service delivery.</p>  | <p>This is in both our legitimate interests in order to ensure that we provide you with the most appropriate and timely advice and support.</p> <p>Where we need to process special category information to monitor our delivery we may process that information for reasons of substantial public interest.</p>  |
| <p>To ensure we monitor our activities and provision of our services to ensure they support and uphold the principles of equity, diversity, and inclusion.</p>   | <p>This is in our legitimate interests because it furthers our aims, objectives and business.</p> <p>Where this information is special category data, we may process that information where necessary in the public interest. In certain circumstances we may, as an alternative, seek your consent.</p>  |
| <p>Subject to you providing consent, to share certain information about you with another party or parties that share common research interests.</p>  | <p>This personal information would be collected on the basis of consent. You are free to refuse or withdraw your consent at any time. Refusing or withdrawing consent will not impact upon your relationship with us or the support you receive.</p>  |
| <p>To manage a dispute, appeal, or complaint.</p>  | <p>This is in our legitimate interests in order to provide our services and to benefit you and others who come to us for confidential support and advice.</p> <p>Where the information is special category information, we may process that information for reasons of substantial public interest. In certain circumstances we may, as an alternative, seek your explicit consent.</p> |
| <p>To comply with any legal, regulatory or public interest obligations including, if required, disclosing your personal information to third parties, including relevant regulators and our professional advisors.</p> <p>Relevant regulators and professional advisors include, but are not limited to:</p> <ul style="list-style-type: none"> <li>• HMRC</li> <li>• The Charity Commission</li> <li>• WLRF's auditors and lawyers</li> </ul> | <p>This is to comply with our legal obligations, including our public duties/obligations as a charity.</p> <p>Where the information is special category information, we may process that information where necessary in relation to legal claims and/or for reasons of substantial public interest.</p>   |

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| <p>Subject to you providing consent, to share your experience of our services with us for us to share with the general public / for marketing purposes.</p>   | <p>This personal information would be collected on the basis of consent. You are free to refuse or withdraw your consent at any time. Refusing or withdrawing consent will not impact upon your relationship with us or the support you receive.</p>  |
| <p>To publish information about research that WLRF has funded and its findings on our website and elsewhere, including as required in line with the agreement signed by all those awarded funding, and subject to compliance with any ethical review processes and conditions under which the research was conducted.</p> | <p>This information would be shared on the basis that it is in our legitimate interest in order to comply with agreements in place, and in order to inform the public about our charitable activities.</p>  |
| <p>Subject to you providing consent, to send you information from WLRF and/or third parties, including related funding opportunities, events and research projects, including their findings.</p>   | <p>This personal information would be collected on the basis of consent. You are free to refuse or withdraw your consent at any time. Refusing or withdrawing consent will not impact upon your relationship with us or the support you receive, but will result in you no longer receiving this information.</p> |
| <p>To gather information from the public domain about organisations and individual researchers working within WLRF's range of interests, for the purposes of supporting research development</p>  | <p>This information would be collected on the basis of legitimate interest in pursuing WLRF's charitable aims.</p>  |
| <p>Subject to you providing consent, to register you for an event we are running, communicate with you about it and if needed put in place appropriate accommodations for your attendance.</p>  | <p>This personal information would be collected on the basis of consent. You are free to refuse or withdraw your consent at any time. Refusing or withdrawing consent may impact your ability to attend any such event.</p>   |

In addition, we will process your personal data for our own **legitimate interests** for good governance, accounting and managing and auditing our business operations. In doing this, your personal data may be used by us (including our staff) and disclosed to third parties (including the third parties from whom we receive your personal information as noted above).

#### **INFORMATION DISCLOSED TO THIRD PARTIES**

For the purposes referred to in this Privacy Notice, we may share your personal data with certain third parties, including:

- With The William Leech Foundation Limited as trustee of WLRF and its personnel, to assess you as a candidate for research funding, to report on applications and applicant enquiries, and to report on the progress and outcomes of the project.

- With Durham University and such of its personnel as are from time to time seconded to WLRF under the secondment agreement in place between WLRF and Durham University.
- With Durham University for them to provide you with information about events and opportunities that they believe are relevant to you, but we will only do this with your consent.
- If you have included the details of a prospective host organisation in a research funding application, with that prospective host organisation to confirm details provided in the application and obtain relevant supporting information from them.
- If you have included the details of a prospective church or other partner organisation in a funding application, with that prospective partner to confirm details provided in the application and obtain relevant supporting information from them.
- If an applicant is successful in being awarded research funding, with the named host organisation and any church or other partner organisation, to provide ongoing support to you throughout your research fellowship in furtherance of the project and to monitor the ongoing success of the project. We may also disclose data pertaining to your payroll and employment status as necessary to confirm details of the funding agreed.
- If you are a research fellow or potential applicant, we may share your contact details with other research fellows and third parties with research interests in common to your own, but we will only do this with your consent. (Note however that general details of all research projects funded by the WLRF including the names of current WLRF fellows are also publicly available on the WLRF website; we would only include contact details for researchers on this website with researchers' explicit consent).
- In the event that we transfer the business or trusteeship of WLRF to another entity, we will disclose your personal information to the prospective other party.
- If we are under a duty to disclose or share your personal information in order to comply with any legal obligation, or in order to enforce or apply the agreements concerning you.

In disclosing your personal information in line with the list above, your data may be combined with other data collected from multiple sources. We may also receive data (except for confidential research data) from third parties for any of the purposes stated above, under the relevant category of legitimate interest and/or consent, and combine it with data we already hold for the purposes mentioned within this notice.

We may use a GDPR-compliant online mailing list provider to provide, maintain and process our e-mail list to those who wish to subscribe to this mailing list. We currently use Campaign Monitor as our GDPR-compliant online mailing list provider to provide and maintain our e-mail list. We will inform existing subscribers of any change to this from time to time. Those choosing to subscribe to this email list will also be subject to the mailing list providers' policies, including those relating to privacy, data use, cookies used in delivering that email, and automated technical information collected by the platform (which may include IP address and therefore approximate location, etc.). This includes collecting basic information on whether emails have been delivered successfully and whether they have been opened by subscribers. Subscribers will be able to exercise their GDPR rights in relation to this directly with the mailing list provider through the subscriber options provided by that mailing list provider platform, including being able to withdraw consent by unsubscribing from this list at any time.

We do not normally disclose your information to a different country outside the UK. However, if your host or prospective host organisation is based outside the UK, our processing of personal data will involve a transfer of some personal data outside the UK to that host organisation. Some information

technology or technical services used in support of the WLRF aims may potentially occasionally involve international servers or similar transfer of information across international borders. Whenever we transfer personal data out of the UK, we ensure a similar degree of protection is afforded to it by ensuring at least one of the following safeguards is implemented:

- personal data is transferred to countries that have been deemed to provide an adequate level of protection for personal data by the European Commission; and/or
- where we use certain service providers, we may use specific contracts or contractual clauses approved by the European Commission which give personal data the same protection it has in Europe.

Any personal data shared with the above third parties will be subject to their data protection policies, details of which can be accessed directly from the third party concerned. If WLRF wishes to share your data with any parties not covered above it will seek your consent before processing your data in that way.

### **SPECIAL CATEGORY INFORMATION**

Some of the personal information that we may collect is known as special category information. This means that the information is more sensitive than other types of information and therefore needs more protection. Special category information is information about your race, ethnic origin, political belief, religious belief, trade union membership, genetics, biometrics, health, sex life and sexual orientation.

Where we process special categories of personal information, we need further justification for doing so. We may process special categories of personal information in the following circumstances:

- in limited circumstances, with your explicit written consent;
- where we need to carry out our legal obligations;
- where it is needed in the public interest, such as for equal opportunities monitoring; or
- where it is necessary to protect you or another person from harm.

Where WLRF is organising events and you have consented to being registered to attend the event, WLRF may also request and collect information about you to facilitate your participation. This may include dietary requirements for the purposes of catering, and any accessibility requirements, which may constitute health data.

Subject to the information applicants provide in relation to the research that applicants and their partner and/or host organisations intend to carry out or are conducting, and given the aims of WLRF, we may also indirectly collect sensitive data on religion, although WLRF does not directly ask for information about your religion.

### **CONTACTING YOU**

WLRF will contact you by email, mail and/or telephone, unless you tell us otherwise.

### **STORING AND RETAINING YOUR DATA**

We will hold your personal information on our systems for as long as is necessary for the relevant activity, or as long as is set out in any contracts we enter into with you. If you are unsuccessful, we



will remove your data within 36 months from the date of your application, but may maintain a record of your name, application subject and reasons for any related decision about your application within minutes and official records as part of the ongoing records for the organisation's governance. This information will be retained in accordance with our data retention schedule, which can be obtained from the Secretary at the above address. The personal data related to successful applications will be kept for seven years from the end of the financial year in which the final grant award payment is made.

We will retain indefinitely information pertaining to funded research, including any published research findings, subject to these being presented in a way that is compliant with any satisfactory ethical review of the research that has been carried out in advance. A general record of all research funded by the WLRF, including reference to the researchers and organisations involved, and any published outputs such as report(s) on the findings created through the award given, may be made publicly available indefinitely, including through the WLRF website.

Only authorised employees and data processors (software suppliers and those working on behalf of WLRF to deliver our products and services) will have access to your data. All parties who have access to your data are required to process/use that data in accordance with the provisions of our Data Protection Policy, which can be obtained from the Secretary at the above address.

Any host organisation that is appointed for a particular award will have its own policies regarding data protection and you can find out more directly from them.

## **YOUR RIGHTS UNDER APPLICABLE DATA PROTECTION LAW**

Your rights are as follows (noting that these rights do not apply in all circumstances):

- The **right to be informed** about the processing of your personal data;
- The right to have your personal data **corrected if it is inaccurate** and to have **incomplete personal data completed**;
- The right to **ask** that your personal information **be deleted** in certain circumstances; The right to **object** to processing of your personal data;
- The right to **withdraw consent** where we rely on your consent to use your personal data;
- The right to have your personal data **transferred** to another organisation in certain circumstances;
- The right to **restrict processing** of your personal data; and
- The right to **request access** to your personal data and how we process it.

You also have the right to complain to the Information Commissioner's Office (**ICO**) where you think we have not used your personal information in accordance with data protection law. The contact details for the ICO are: <https://ico.org.uk/> or 0303 123 1113. A legal or regulatory requirement to retain your data would override your wish to remove your data.

## **ACCESSING YOUR DATA**

You can request to see your personal data that is held by WLRF by contacting the Secretary in writing at the above address/email address. We will endeavour to provide you with a copy of the

information we have about you with one calendar month of your request, although we may extend this response time within our permitted limits.

If you make a subject access request, and if we do hold information about you, subject to any available exemptions we will:

- Give you a description of it;
- Tell you why we are holding and processing it, and how long we will keep it for;
- Explain where we got it from, if not from you;
- Tell you who it has been, or will be, shared with;
- Let you know whether any automated decision-making is being applied to the data, and any consequences of this; and
- Give you a copy of the information in an accessible format.

Protocols that will be followed in the event of a data breach are covered in the separate Data Protection policy.

#### **USE OF THIRD PARTY SITES**

From time to time we may engage with you through websites and platforms hosted by third parties, for example engaging on social media, or third party event booking sites (e.g. Eventbrite) to manage the event booking process.

In this instance, your personal information (including any special category data) that you share for the purposes of using that platform will also be processed and held by that third party site under their own terms and privacy policy, and WLRF has no responsibility for this.

#### **UPDATING THIS NOTICE**

We may update this Privacy Notice at any time. When we do we will publish the new Privacy Notice on our website.

The updated Notice will take effect as soon as it has been published on our website or otherwise communicated to you (whichever is earliest).