

CILEX Foundation Privacy Statement

The CILEX Foundation takes your privacy and your rights to your personal data extremely seriously and we are committed to protecting the privacy of all personal data obtained about individuals. Data is held in compliance with the Data Protection legislation and other applicable data privacy laws.

We are committed to protecting the privacy of all personal data obtained about individuals through, but not limited to, personal contact, email enquiries, etc.

Data will be collected and used only for the purposes for which it was originally submitted or in accordance with your preferences.

Contents:

A.	Who we are and how to contact us	2
B.	How we communicate with you	2
C.	How and why we obtain personal data	2
D.	The personal data we collect, how we collect it and where is it stored	3
E.	Sharing personal data.....	5
F.	How long do we keep your personal data	6
G.	Your rights	6
H.	Reviewing the Privacy Statement	7

A. Who we are and how to contact us

CILEX (Chartered Institute of Legal Executives) is the governing body for Chartered Legal Executives, Paralegals, and other legal professionals. CILEX as a professional association provides professional development, support, and guidance to its members. It delivers legal education and training through CILEX Law School, qualifications through its Awarding Body function and independent regulation through CILEX Regulation (CRL).

The CILEX Foundation is a registered charity (Registered Charity Number 1185862) which provides support for members. The charity provides support with academic advancement, benevolent grant making and support to access volunteering opportunities including Pro Bono legal work.

Our registered address is: Kempston Manor, Kempston, Bedford MK42 7AB.

In most circumstances, The CILEX Foundation is the controller in relation to the personal data it holds and the processing activities it undertakes as outlined below. This means that CILEX Foundation decides why and how the personal data it holds is processed and, where it delegates the handing of that data to other companies within CILEX or any others who provide services to The CILEX Foundation, those companies act as processors.

If you have any questions about this Privacy Statement, log in to myCILEX Portal and go to Contact Us, then select 'Data Protection: Query and Request' on 'My Query Relates to' section. If you do not have access to the myCILEX Portal, or do not wish to log your details on the system, please contact us by email at privacyofficer@cilex.org.uk.

B. How we communicate with you

The CILEX Foundation respects the privacy of personal data we hold.

We use direct communications such as newsletters to communicate with CILEX's members. You can control what you like to receive at any time in your user account preference centre. Unless you advise otherwise, we will continue to send updates.

C. How and why we obtain personal data

The CILEX Foundation only processes personal data where we have a lawful basis to do so. In some instances, there may be more than one lawful basis for which we process your personal data.

The lawful basis which are relevant to The CILEX Foundation are as follows:

1. Consent of the Data Subject

The CILEX Foundation processes personal data where you have given consent for us to do so. This includes, but is not limited to, newsletters and the application form.

2. Compliance with a Legal Obligation

We have a basis to use your personal information where we need to do so to comply with one of our legal or charity regulatory obligations. For example, in some cases we may need to share your information with our various legal bodies or regulators such as the Charity Commission, Fundraising Regulator or the Information Commissioner's Office (ICO).

3. Legitimate Interest

The CILEX Foundation processes personal data which is necessary for the pursuit of its legitimate interests as a Foundation. This includes, but is not limited to, responding to general enquiries and supporting members.

The law allows us to do so provided the processing is fair, balanced and does not unduly impact your rights.

4. How we process personal data

The CILEX Foundation collects and processes personal data. Your personal data will be used for the purposes specified in this Privacy Statement or otherwise notified to you. In particular, we may use your personal data for the following purposes:

- a. to provide you with services or information you have requested;
- b. to keep a record of your relationship with us;
- c. to contact you in case of any queries regarding or assistance you might require with the completion of the application form;
- d. to respond to or fulfil any requests or queries you make to us;
- e. to provide further information about our services or activities;
- f. to answer your questions/requests and communicate with you in general;
- g. to process donations you make to the CILEX Foundation, including the processing of Gift Aid applications.
- h. to further communicate our organisational aims in general;
- i. to analyse and improve our work, services, activities, information or for our internal records;
- j. to report on the impact and effectiveness of our work;
- k. to divulgate our charitable objectives;
- l. to process applications for funding;
- m. to monitor the appropriate use of grant funds;
- n. to satisfy legal obligations which are binding on us, for example in relation to charity regulatory, government and/ or law enforcement bodies with whom we may work;
- o. for the prevention of fraud or misuse of services.

D. The personal data we collect, how we collect it and where is it stored

The CILEX Foundation is committed to respecting the personal data you supply to us. The personal data we collect will be relevant to the purposes for which it is to be used and we will do our utmost to ensure that such personal data will be accurate, complete, and kept up to date. Whenever personal data is obtained from you, you will have access to information explaining how that personal data will be used.

1. The personal data we collect

CILEX may collect, store, and otherwise process the following kinds of personal data:

- a. name and contact details including postal address, telephone number, email address and emergency contact details;
- b. date of birth;
- c. gender and ethnicity;
- d. employment data such as: salary, job title, length of services, employers' name, contact details, financial information;
- e. financial information (i.e., income, outgoings and debts);

- f. data you provide to allow us to make an application to the HMRC for Gift Aid on any donation you make
- g. data from partners and dependants;
- h. information about your computer/ mobile device and your visits to and use of this website, including, for example, your IP address and geographical location;
- i. Through cookies on our website.

For further information on our Cookies Banner and the use of Google Analytics, please read our website [Cookies Policy](#).

2. Special Category of Data

We may also collect special category data in the application form (physical and mental health information may be included in free type boxes if this information is relevant to the claim).

Health records, medical reports or correspondence from support services relating to physical or mental health conditions may be also collected as supporting documentation relative to the claim.

Such data will only be collected and/or provided to us, if you have provided your explicit consent or if we are otherwise permitted to receive and process it under the UK Data Protection legislation.

For the processing of special categories of data, we consider whether the risks associated with our use of this type of personal data will affect our other obligations around data minimisation and security. A Data Protection Impact Assessment (DPIA) and an appropriate policy document should be completed.

3. How we collect personal data

- a. When you give it to any part of CILEX **directly**
For example, personal data that you give to us when you communicate with us by email, phone or letter, such as when you complete the application form to apply for financial grants and money management advice, report a problem or sign-up to receive our communications.
- b. When we obtain it **indirectly**
For example, your personal data may be shared with us by third parties (e.g., for one of your dependants).
- c. When it is available **publicly**
Your personal data may be available to us from external publicly available sources. For example, depending on your privacy settings for social media services, we may access personal data from those accounts or services. In general, we may combine your personal data from these different sources set out in a-c above, for the purposes set out in this Statement.

4. Complaints

Where you lodge a complaint, your personal data will be used to correspond with you. A complaint can be made in writing or by telephone. We encourage complaints to be made in writing by completing a 'Contact Us' form by logging into your myCILEX account via the CILEX website wherever possible.

When we receive a complaint, CILEX and the Board of Trustees will be notified, and the case could be also elevated to the Charity Commission.

Your complaint will be retained for two years after resolution, in line with The CILEX Foundation Archive, Retention and Destruction Policy. To exercise your rights please see section G of this Privacy Statement.

5. Access to your personal data

We take reasonable steps to ensure that the personal data we hold will be accurate and up to date. You can check the personal data that we hold about you, if you are a member through your myCILEX account. Alternatively, you can ask us to check by using the website's Contact Us Form and selecting 'Data Protection: Query and Request' on 'My Query Relates to' section. If you do not have access to the myCILEX Portal, or do not wish to log your details on the system, please contact us by email at privacyofficer@cilex.org.uk.

6. Storage of data

Personal data collected by The CILEX Foundation is stored on secure CILEX IT systems.

No external person will have access to The CILEX Foundation records except in circumstances outlined in this Privacy Statement.

Any third party contracted by The CILEX Foundation to process personal data on its behalf will be requested to have security measures in place to protect the personal data and to treat such data, in accordance with UK Data Protection legislation. We also set up Data Processing Agreements with our third parties.

E. Sharing personal data

The personal data we collect will only be used for the purposes set out in this Statement or otherwise notified to you. We will not disclose your personal data to third-parties except as set out in this Statement, including where required to or permitted to by law or where those parties are conducting The CILEX Foundation activities on our behalf.

We share data with CILEX where CILEX has a legitimate interest in using that data to inform the work it undertakes in providing services to its members.

In circumstances, where we engage a service provider, we ensure that personal data is only processed in a manner compliant with the relevant law, and subject to a formal data processing agreement, and only used for the purposes for which the personal data was originally collected.

We might share the information included in the application with Auriga Services Ltd who provide financial claims management services.

We will also need to share your personal data with our good and services providers under members agreement.

However, we do not allow our third-party service providers to use your personal data for their own purposes. They can process your personal data for specific purposes and under our instructions.

Personal information may be shared with a third party who has a legitimate interest in the data, where disclosure is necessary and lawful, and the processing is aligned with the purpose for which the personal data was originally collected.

We also might share personal information with the Police or other organisations that have a crime prevention or law enforcement function. Data Protection legislation allows organisations to share personal information if it is needed to prevent or detect a crime, or to catch and prosecute a suspect.

If we undergo a merger or reorganisation, in doing so we may acquire or transfer personal data as part of that transaction, but your personal data would continue to be used for the same purpose.

1. International Transfers

We may transfer personal data to countries outside of the United Kingdom where personal data is not protected in the same way (usually to other businesses who provide services on our behalf). In such cases, we will make sure that suitable safeguards are in place to protect the personal data. Additional steps are taken to ensure that appropriate measures and controls are in place to protect that data in accordance with relevant data protection laws and regulations.

2. Financial Information

The CILEX Foundation does not store credit/debit card details nor share financial information with third parties.

F. How long do we keep your personal data

In general, The CILEX Foundation only retains personal data for as long as necessary to fulfil the purposes for which it is being processed (including to comply with relevant legal or regulatory requirements).

That length of time may vary depending on the reasons for which we are processing the personal data and whether we have a legal or contractual obligation to keep it for a certain amount of time.

Once the retention period has expired, personal data will be confidentially disposed of or permanently deleted. If you object to further contact from us, we will keep some basic information about you in order to avoid sending you unwanted communications in the future.

If before that date (i) your personal data is no longer required in connection with such purpose(s), (ii) we are no longer lawfully entitled to process it or (iii) you validly exercise your right of erasure, we will remove it from our records at the relevant time

G. Your rights

You have the following rights:

- access to your personal data;
- have inaccurate personal data rectified;
- object to certain processing of your personal data.

In certain circumstances, you might have the right to:

- have your personal data erased;
- restrict the processing of your personal data;

- Data portability i.e., the right to have your personal data provided in a structured, commonly used and machine-readable format.

In certain cases, The CILEX Foundation can refuse to comply with a request if it is manifestly unfounded or excessive. In order to decide if a request is manifestly unfounded or excessive, The CILEX Foundation must consider each request on a case-by-case basis.

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H. Reviewing the Privacy Statement

The CILEX Foundation will review and update this Privacy Statement from time to time, when changes to our processes or procedures and systems are made, if laws and regulations change or if new circumstances require it.

If this Privacy Statement changes in any way, we will make it publicly. Regular review of this page ensures that you are always aware of what personal data we collect, how we use it and under what circumstances.

CILEX will make reasonable efforts to contact and update those affected if the changes are significant in nature.

Correct as at: November 2022

Next formal review date: April 2024