IDPE Privacy notice

We want everyone who is a member of IDPE, or who engages with IDPE, to feel confident and comfortable with how we will process any personal information you share with us. Our use of personal information allows us to ultimately achieve our vision of enabling every school to develop a culture of giving so they can provide the best educational opportunities.

This privacy notice sets out how we collect, use and store your personal information (this means any information that identifies or could identify you). It explains how we will protect your personal information, the controls and safeguards we have in place, and your rights and choices.

The processing of personal information, such as your name, address, e-mail address, or telephone number shall always be in line with the General Data Protection Regulation (GDPR), The UK Data Protection Act 2018 and the Privacy and Electronic Communications Regulations (PECR). We are registered with the Information Commissioner's Office (ICO) as a data controller.

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1. Who we are

IDPE is a charity working with both independent and state schools based in the UK and abroad, to support schools in engaging with and fundraising from their communities.

2. Who this notice applies to

The IDPE community comprises of:

- IDPE member schools
- IDPE corporate members
- Suppliers (organisations listed in our supplier directory)
- Organisations/associations working in the education or charitable sectors

IDPE also processes personal information of individuals who are:

- associate IDPE members
- signing up to our regular e-communications
- speakers at our events
- working for prospective member schools or potential corporate partners
- IDPE employees (including current, past and prospective)
- IDPE volunteers
- Job seekers using the IDPE job board
- suppliers
- media contacts

Anyone who works for, or acts on behalf of, IDPE (including staff, volunteers, board members and service providers) should be aware of and comply with this privacy notice.

3. Why we collect information about you

We will mainly use your personal information:

- to provide member services; including professional development, regional meetings/forums, guidance, job board postings and regular updates about our work and the wider sector
- to keep a record of your relationship with us, including attending events, opening of communications, website visits, and any other interactions with us
- to respond to or fulfil any requests or queries you make of us
- to manage our events, such as the annual conference and professional development programme
- where you volunteer with us, to administer the volunteering arrangement
- to enable peer-to-peer support and sharing of expertise through our members' directory and members' forum
- to invite you to participate in surveys, research or consultations, such as the benchmarking survey to inform the sector, or our membership survey, to better understand how we can improve our services
- to administer our website and online membership system
- to advertise a job vacancy with us
- to send you job alerts
- to provide information about our work and the services/benefits we provide (i.e. direct marketing)
- to generate reports on our work, services and/or events
- to make use of photographic images on our website and in our promotional literature
- to check and update contact details so we can stay in touch with you

- to process payments (or refunds), such as annual membership subscriptions, event fees, expense reimbursements
- to register you with IDPE WhatsApp group chats, with your explicit consent to do so
- to meet our legal obligations and carry out necessary due diligence, for instance to perform contracts between you and us, or to fulfil our obligations to regulators, government and/or law enforcement bodies
- to process applications for a job (or volunteering) position; conduct training and quality control; process salaries; provide references; and any other employee related activities
- to further our charitable objectives

4. What information we collect about you

Everything we do, we do to achieve our vision: to enable schools to develop cultures of giving.

We collect, store and use the following kinds of personal information:

- your name
- your job title
- your organisation's (school, corporate, association) contact details (including postal address, telephone number, email address and/or social media identity)
- your experience and/or interests
- your engagement with us, i.e. attending events, opening up communications, website visits, volunteering
- if you volunteer for us or apply for a job with us, information necessary for us to process these applications and assess your suitability (which may include things like employment status, references (both professionally and personally), previous experience depending on the context, as well as any unspent criminal convictions or pending court cases you may have)
- if you are a trustee, information on other directorships and volunteer roles, and any related party transactions between IDPE, trustees and their other roles
- if you are a trustee, date of birth and home address
- information about our work, services and benefits which we consider to be of interest to you
- information for our events such as dietary and accessibility requirements
- age, nationality and ethnicity information for staff monitoring purposes
- if subscribing to job alerts via our job board, email address and search preferences
- if posting a job, employers will need to register for an account on the job board through which we collect email address, first name, last name, password and IP address (used for security purposes). It is then optional whether you provide phone number, company name, company description, logo, additional media images, company location, longitude/latitude (geocoded from location value)
- any other personal information you provide to us

Certain types of personal information are more sensitive and classed as special category personal data (concerning health, ethnicity, religion, or sexual life) under data protection laws. We only capture special category data for IDPE staff where necessary and in some instances for our events, for example, to provide the appropriate access facilities and for dietary requirements. This information will be accessible under the 'need to know' principle.

5. How we collect information about you

We collect information from you in the following ways:

When you interact with us directly: This could be if you ask us about our services, register with us for training or an event, post a job advertisement, apply for a job advertised on our website, ask a question about schools' development, register a job vacancy with us, apply for a job or volunteering opportunity, sign up to our regular e-newsletter, email alerts or provide us with your personal information for another reason. This includes when you phone or email us, visit our website, or get in touch through the post, or in person.

When you visit our website: We gather general information which might include which pages you visit most often and which services, events or information is of most interest to you. We may also track which pages you visit when you click on links in emails from us and use "cookies" to help our site run effectively. There are more details below – see 'Cookies'.

We use this information to personalise the way our website is presented when you visit, to make improvements and to ensure we provide the best service and experience for our members.

From other information that is available to the public: In order for us to achieve our vision of enabling *all* schools to achieve cultures of giving, we may collect personal information from publicly available sources relating to individuals working at existing or prospective member schools, corporate organisations that wish to join the charity, and for organisations/associations working in the education or charitable sectors. We do this so our marketing approaches remain informed and tailored.

6. Our legal bases for processing

We will only process your personal data on the basis of one or more legal grounds depending upon the specific purpose for which we are using your information. In the majority of cases, the legal basis falls into one of the following categories below.

- **For contractual purposes**
    - we will need to process personal data of our members in order to provide them with the various services and benefits to which they are contractually entitled, including membership, professional development and job advertising
    - we will need to process personal data relating to our staff in order to fulfil our duties and obligations under their employment contract and employment law

- **For IDPE's legitimate interests**

Other uses of personal information will be made where necessary for the purposes of IDPE's legitimate interests providing these are not overridden by the interests, rights and freedoms of individuals and this does not involve the processing of special category personal data. Examples include:

- to make use of photographic images on IDPE's website or promotional materials (please see below for photographic images including children and young people)
- to provide information about our benefits and services to members, prospect schools or potential corporate members and suppliers
- to retain information about our relationship with members, suppliers and associations or organisations working in the education or charitable sectors
- to share personal information via our members' directory, enabling other members to contact schools and seek advice, via the members' directory (this is completed by members themselves therefore they can share as much or as little personal information as they choose)
- to share personal information with our regional network of volunteers (Regional Vice Presidents and Co-ordinators) to develop support for members

- to share personal information with host schools or venues regarding delegates at our events
- to share personal information with other associations or organisations working in the education or charitable sectors where we are working in partnership on an event or activity to support members and/or champion schools' development
- to share personal information where we enter into partnership agreements under a data sharing agreement to support members and/or champion schools' development, for example benchmarking and membership surveys, Certificate in Fundraising
- to share resources, case studies, presentations, podcasts, webinars or other information via our resource library to support members
- to retain and update contact details of lapsed members and suppliers, so we can continue to share information about current member benefits and services
- to carry out or cooperate with any internal or external complaints, disciplinary or investigation process
- to allow certain third-party service providers to process your information on our behalf but we only do this in accordance with data protection law
- where otherwise reasonably necessary for IDPE to fulfil its purposes provided that these are not outweighed by the impact on individuals and provided it does not involve special or category personal data.

You can opt out of any of these uses of your personal information at any time by emailing info@idpe.org.uk.

- **Where you have provided your consent**

IDPE relies on your consent to process your personal data in some specific instances, for example:

- to make use of photographic images including children or young people provided by member schools on IDPE's website or promotional materials
- if you are not an IDPE member but have opted in via our website to receive e-communications from us
- to share personal information with other members at regional meetings and forums
- to share personal information beyond what is shared in our members' directory, with our corporate partners
- to join an IDPE WhatsApp group chat
- to advertise a job vacancy
- to process personal data and special category personal data for the purposes of giving or receiving a reference or for internal diversity and health and safety monitoring purposes.

Where we rely on your consent to process your personal data you have the right to withdraw that consent at any time. Please contact Vicky Roe, IDPE's Chief Operating Officer for further information.

- **Other legal bases for processing personal data**

IDPE may rely on other legal bases to process personal information. For example, where we have a legal obligation to do so including our obligations as an employer.

We will only use your personal information for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose. If we consider the new purpose to be incompatible with the original purpose of collection, we will carry out a Data Protection Impact Assessment (DPIA) or contact you to request your consent for further processing.

7. How long we keep your information

We will only retain your personal information for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting or reporting requirements. We will delete or anonymise the data after this period. To determine the appropriate retention period for personal information, we consider the amount, nature and sensitivity of the personal information, the potential risk of harm from unauthorised use or disclosure of your personal information, the purposes for which we process your personal information and whether we can achieve those purposes through other means, and the applicable legal requirements.

In some instances, you can ask us to delete your personal information (please see below).

If you would like to know more about how long we retain your personal information, please contact Vicky Roe, IDPE's Chief Operating Officer on 01225 829030, vicky.roe@idpe.org.uk.

8. Keeping your information safe

We take looking after your personal information very seriously. We have implemented appropriate physical, technical and organisational measures to protect the personal information we have under our control, from improper access, use, alteration, destruction and loss.

All personal information you provide to us is stored on our secure servers or within secure cloud-based systems provided by third party sub-contractors. Full cyber security measures are in place, in line with National Cyber Security Centre guidelines and IDPE has achieved Cyber Essentials Accreditation. In addition, an annual IT audit is completed to ensure data is as secure as possible.

Where we have given you (or where you have chosen) a password which enables you to access certain parts of our website, you are responsible for keeping this password confidential. You must not share your password with anyone.

Our website idpe.org.uk may contain links to other websites, for example to sector news stories or to organisations we work closely with such as our corporate partners and associations working in the education and charitable sectors. While we try to link only to sites that share our high standards and respect for privacy, we are not responsible for the content or the privacy practices employed by other websites. [Please also be aware that these websites may collect personally identifiable information about you. This privacy statement does not cover the information practices of those websites.]

9. Sharing your information with others

Please be assured that we will not share your personal information for any other reason unless we are required or permitted to do so by law or under this privacy notice.

The main circumstances in which we will be permitted or required to disclose your personal information by law, will be by court order, to government bodies or law enforcement agencies. However, sometimes we may share your personal information with third parties in the following ways:

- we may use carefully selected service providers to help us collect, store or manage your personal information on our behalf. Where we do this, it will always be done securely and in a way that complies with data protection law

- all IDPE members are included in the IDPE members' directory so members can connect with their peers. The directory displays an individual's name, job title, school and telephone number only and members can update their profile to indicate that they do not wish to be listed. No emails are listed and members will instead have the option of contacting their peers through a private direct messaging function
- we may be required to share personal information with host schools or venues regarding delegates at our events
- we may share personal information with our regional network of volunteers (Regional Vice Presidents and Co-ordinators) to develop support for members
- we may share personal information with designers and/or printers to send members postal mailings, print materials for our events
- occasionally we enter into partnership agreements with other associations to share specified personal information, which we have lawful grounds to do so and always under a data sharing agreement, which can be produced to the data subjects in question at any time. For example, when carrying out benchmarking or membership surveys
- we may share personal information with analytics and search engine providers that assist us in the improvement and optimisation of the website
- any payments taken by debit or credit card are processed by a third party
- we may share additional personal information with our corporate members, beyond what is provided within the members' directory, however we will not share any personal information with them without your consent to do so

10. Transfer of information outside of the EU

Occasionally, we may need to transfer information we process about you to countries outside the EU which do not provide the same level of data protection as the country in which you reside, for example, where your data is being held on our behalf by third party service providers whose servers are geographically located outside the EU. Where this happens, in order to ensure that your personal information is adequately protected we have put in place measures to ensure that your personal information is treated by those third parties in a way that is consistent with and respects the EU and UK laws on data protection such as standard contractual clauses which have been approved by the European Commission.

If you would like to know more about transfers outside of the EU please contact Vicky Roe, IDPE's Chief Operating Officer on 01225 829030, Vicky.roe@idpe.org.uk

11. Cookies

Cookies contain information that is transferred to your computer's hard drive. They help us to improve our services and to deliver a better and more personalised service.

You may refuse to accept cookies by activating the setting on your browser which allows you to refuse the setting of cookies. Unless you have adjusted your browser setting so that it will refuse cookies, our system will issue cookies when you access our services. For further information, please see section H Cookies of Potentiality's Privacy Policy.

We do not use cookies to provide marketing information to third parties.

12. Your rights

You have various rights in respect of the personal information we hold about you – these are set out in more detail below:

- right of access – you have the right to request a copy of the personal information that we hold about you free of charge. Please make all requests for access in writing and provide us with evidence of your identity. As the data subject you are only entitled to such confirmation, personal data and other information as the controller (IDPE) is able to provide based on a reasonable and proportionate search for the personal data and other information
- right of rectification – you have a right to correct personal information that we hold about you that is inaccurate or incomplete.
- right to be forgotten – you can ask us to delete your personal information where it is no longer necessary for us to use it, you have withdrawn consent, or where we have no lawful basis for keeping it.
- right to restriction of processing – you have the right to restrict the processing of some or all of your personal information in the following situations:
    - if some information we hold on you isn't right
    - we're not lawfully allowed to use it
    - you need us to retain your information in order for you to establish, exercise or defend a legal claim
    - you believe your privacy rights outweigh our legitimate interests to use your information for a particular purpose and you have objected to us doing so.
- right of portability – you have the right to have the personal information we hold about you provided to you or a third party in a structured, commonly used, electronic form, so it can be easily transferred.
- right to object – you can ask us to restrict the personal information we use about you where you have asked for it to be erased or where you have objected to our use of it, for example for direct marketing purposes. Please contact us providing details of your objection.
- right to object to automated processing, including profiling – automated decision-making takes place when an electronic system uses personal information to make a decision without human intervention. You have the right not to be subject to the legal effects of automated processing or profiling. We do not currently carry out any automated decision-making.

Please note, some of these rights only apply in certain circumstances and we may not be able to fulfil every request. For more details we recommend you consult the guidance published by the Information Commissioner's Office (ICO) http://ico.org.uk/.

If you wish to exercise any of these rights, you can do so by contacting IDPE on info@idpe.org.uk or by phone on 01225 829030. We will endeavour to respond fully to all requests within one month of receipt of your request, however if we are unable to do so we will contact you with the reasons for the delay.

13. If You fail to provide information to us

Where we need to process personal data by law or under the terms of a contract we have with you and you fail to provide the personal data when requested, we may not be able to perform the contract we have or are trying to enter into with you (for example, to provide you with membership

services and benefits). In this case, we may have to decline to provide or receive the relevant services, but we will notify you if this is the case at the time the personal data is collected.

14. Keeping your information up to date and accurate

IDPE has a legal obligation to keep your information accurate and up to date. To help us with this task we may ask you to update your details from time to time. You can amend your contact details [and communication preferences] at any time using the details set out below and we will remind you of this in all communications we send.

15. Monitoring

We may make changes to this privacy notice at any time, to ensure it accurately reflects the way we collect, use and safeguard your personal information. Please check this notice regularly to ensure you are aware of any updates. The date of the changes will be detailed as below.

If we make any significant chances to this privacy notice, we will make this clear on our website or contact you about these changes.

This version was last updated on **10 September 2025.**

16. Complaints Process

IDPE operates a formal complaints process for handling data protection concerns, allowing individuals to raise complaints directly with IDPE, as the data controller, before escalating to the ICO. If you believe your personal data has been mishandled, please complete our online form.

IDPE acknowledges receipt of all complaints within 30 days and will take appropriate steps to respond to the complaint without undue delay. This includes keeping you informed of the progress and outcome of your complaint.

If you are not satisfied with the response from IDPE, you can escalate the complaint to the ICO. This step can only be taken after the complaint has been addressed by IDPE.

Access the online complaint form here.

17. How to contact us

If you have query concerning how we look after your personal information, contact our Chief Operating Officer, Vicky Roe on 01225 829030, Vicky.roe@idpe.org.uk**.**