

Privacy notice

Last updated 31 March 2023

**Royal
Geographical
Society**

with IBG

Advancing geography
and geographical learning

● How we use your personal data for fundraising

Introduction

Where we have your permission, we may invite you to support vital work by making a donation, getting involved in fundraising activities or leaving a gift in your will.

Occasionally, we may invite supporters to attend events where they can find out more about the ways donations and gifts in wills make a difference. We'll keep a record of which events you are invited to and whether you were able to attend.

If you make a donation, we'll use any personal information you give us to record the nature and amount of your gift, claim Gift Aid where you've told us you're eligible and thank you for your gift. If you interact or have a conversation with us, we'll note anything relevant and store this securely on our systems.

Charity Commission rules require us to know where funds have come from, as well as any conditions attached to them. We follow a due diligence process which involves researching the financial soundness, credibility, reputation and ethical principles of donors who've made, or are likely to make, a significant donation to the Society. As part of this process, we'll carry out research using publicly available information and professional resources.

Please also read our main privacy notice on our website, www.rgs.org/privacy-notice.

If you want to change whether or how you hear from us, or have any questions about the data we hold or how long we hold it, please contact Caitlin Watson, Head of Communications and Public Engagement on c.watson@rgs.org.

When we use Legitimate Interest

We sometimes use Legitimate Interest in limited circumstances in our fundraising activities as our legal basis for processing personal data. We always conduct a Balance Test when doing this, weighing the protection of your rights and personal data with our use of your data to continue supporting our interests. These Balance Test are assessed by our Data Protection Officer, to ensure that the rights of our supporters are maintained.



Major gifts

Where we have your consent to do so, we may use your contact information to invite you to fundraising meetings and events; send information about relevant projects you may be interested in supporting; and update you on the impact your support is making.

As a charity reliant upon fundraised income, it is in our legitimate interests to use personal information in the ways described below, to help us understand our supporters and potential supporters, tailor our communications and use our resources effectively:

- If we invite you to an event or to meet with one of our fundraising team, or if we are in discussions with you about how you can support us now or in the future, we will use your personal information to ensure that we can have a more informed conversation with you:
 - if you are a member of the Society this typically includes: contact and membership details; the amount and purpose of any previous donations; a record of communications we have sent or received from you
 - we may note conversations and interactions we have with you where it is relevant to your relationship with us.
- We may use your information in an aggregated format to help us understand the profile of supporters like you, so that we can target our communications more effectively in future and use our resources as cost effectively as possible.
- We may also conduct research to understand areas of our work that you may be interested in supporting. Where we do this, we use publicly available information, such as: professional profiles (for example, corporate biographies and/or LinkedIn profiles); search engine and public social media results; resources such as Companies House and the Charity Commission; and third-party publications such as Debretts, Who's Who and the Sunday Times Rich List.
- We may also use third-party aggregators of publicly available information to review financial, philanthropic and professional information. If you would rather we did not do this, please just let us know and we will, of course, respect your wishes.

In line with Charity Commission requirements, we follow a due diligence process to assess the financial soundness, credibility, reputation and ethical principles of donors who have made, or are likely to make, a significant donation to the Society. As part of this process, we will conduct research using the methods referenced above.

We are committed to looking after your data carefully and we store your personal data on our secure systems. If you are attending a meeting or event, we may need to share some basic information about you with staff, Trustees or advocates who are helping us to fundraise on a voluntary basis. It is only shared with those who need to know the information for the purposes set out in this privacy notice, when they need to know it.

Gifts in wills

If you've told us that you have left a gift in your will (a pledge), or are thinking about doing so, we will keep details of this. If we have a conversation or interaction with you (or with someone who

contacts us in relation to your will, such as your solicitor), we'll make a note of these throughout your relationship with us, as this helps to ensure we direct your gift as you wanted.

Where a donor has passed away and we are in the process of receiving their legacy gift, we will process personal data of individuals involved in the estate administration for the purpose of ensuring our compliance with legal obligations in receiving and using the legacy gift for our charitable purposes. Access to this personal data is restricted and stored for as long as necessary to administer our legacy. More detailed information about use of personal data for this purpose is provided to the estate Executors, Trustees or their professional advisors during the legacy administration process and can be found below.

We rely on legitimate interests to process personal data of individuals involved with the supporter and their estate. Where we would like to process data that is not for the direct purpose of the legacy administration process, we will seek specific consent from an individual - for example, if we would like to remain in contact with a donor's relative to update them on how the legacy has been used to benefit a specific area of the Society's work.

Where we collect personal data from:

- Executors, Trustees, solicitors and any other professional third party instructed in the legacy administration process.
- Third parties, such as the Smee & Ford notification service.
- Copies of wills either provided by Executors, Trustees or other professionals acting in the administration, or publicly available online.
- Other co-beneficiary charities that have a similar interest to us under the will.
- The public domain

Whose personal data we collect:

- Donors who have left us a gift in their will.
- Employees of organisations that we need to communicate with during the administration - process including charity legacy officers, solicitor employees, estate agents etc.
- Executors of the estate and Trustees of Will Trusts, who may be family or friends of the donor, or a professional advisor such as a solicitor, accountant or banker.
- Other individuals named as beneficiaries in a will, including those who have a life interest in an ongoing Will Trust.
- Next of kin and or family members that we seek permission to thank and report on the progress of a legacy gift and how it has benefited the Society

What data do we collect for gifts in wills:

- Home address and contact details.
- Co-beneficiaries' level of entitlement to any gifts or share of an estate in which we receive a benefit.
- Telephone, email, internet, fax, instant messenger use or other electronic communication details where provided to us.

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- Sensitive personal information such as health status, if it is pertinent to the legacy case and there is a clear reason for doing so.

How do we use gifts in wills data?

- We will only use personal information for the purposes of the legacy administration process, the purposes for which it was obtained. For example, we will not use personal data to market or fundraise from the Executor or next of kin without their express consent to do so.
- We only share your information internally where it is directly relevant to those who need to know, when they need to know it.
- We may need to share your information with 'data processors' such as associated organisations and agents who provide us with a legacy administration service or other charity beneficiaries who have a similar interest to our own. These 'data processors' will only act under our instruction for use and security of your data.

How do we store gifts in wills data?

- Personal data is stored on our electronic database case management system with restricted access to relevant staff. Any paperwork containing personal data is kept to a minimum, locked away when not in use and securely destroyed when no longer needed.
- Personal data is held for as long as is necessary to ensure our legal entitlement is administered without challenge. Some legacy administration cases can be ongoing for long periods, for example in a life interest case where we have an interest in an asset that someone else is entitled to live in during their lifetime. There may be some cases where a longer retention period is required, for example where the Society is acting as Executor or Administrator and has an ongoing duty to comply with conditions attached to the gift.