**Information Notice and Data Protection Policy**

**How we use your information**

This information notice tells you what to expect when Wootton George Consulting Ltd collects personal information. It also serves as a description of our policy in this area, setting out why and how we process data relating to individuals, in order to comply with data protection legislation. It applies to information we collect about:

* People who visit our website
* People who enquire about our services
* People who sign up for our e-newsletter
* People who contact us via social media
* People who use our services
* Job applicants, current and former employees and associates
* Fundraising research
* Complaints or queries
* Access to personal information

**People who visit our website**

When someone visits [www.wgconsulting.co.uk](http://www.wgconsulting.co.uk) we use a third party service, Google Analytics, to collect standard internet log information and details of visitor behaviour patterns. We do this to find out things such as the number of visitors to the various parts of the site. This information is only processed in a way which does not identify anyone. We do not make, and do not allow Google to make, any attempt to find out the identities website visitors.

**Our use of cookies**

Our website employs cookies to help us understand how visitors navigate it, which pages they land on, which pages are the most read, which pages visitors leave from, how long people spend on the website, which countries visitors are based in and which browsers they are using.

**Search engine**

Our website has a search facility to enable visitors to find useful information. However, we do not collect any user-specific data and do not track what information individuals access.

**People who enquire about our services**

People enquire on behalf of organisations about our services via a range of channels. We collect, store and process their basic information on the grounds that it is in our legitimate interest to do so.

**Via our Website**

Our website has an enquiry contact page that captures basic information about the enquirer, their organisation, their work contact details and the nature of their enquiry. This is held in Citrix Podio (an online CRM package with password protection, that is covered by Privacy Shield) in order to help us service the enquiry. It is a condition of our providing a quotation or proposal that enquirers permit the storage of this basic data. When an enquiry lapses or progresses to a contract, it is deleted from our system.

**By telephone**

When an inbound telephone enquiry is made, we capture and record basic information about the organisation the enquirer represents, as well as their work contact details, job title and nature of the enquiry. Contact details can include email address and telephone numbers. This data may be entered into our CRM package. We keep a paper copy of the telephone note for up to one year, after which it is destroyed, or, in the case of enquirers who become our clients, for longer periods as required. All paper records are destroyed after the HMRC recording period of six years. We also maintain basic contact details of enquirers in Google for Business, a cloud hosted software package, that is covered by Privacy Shield.

**By email**

When a person enquires by email,we seek to capture and record in our CRM package basic information about the organisation the enquirer represents, as well as their work contact details, job title and nature of the enquiry. Contact details can include email address and telephone numbers. We keep a paper copy of the telephone notes for up to one year, or, in the case of enquirers who become our clients, for longer periods, as required. All paper records are in any case destroyed after the HMRC recording period of six years. We also maintain basic contact details of enquirers in Google for Business.

**People who sign up for our e-newsletter**

When someone signs up to receive our electronic newsletter, we capture their name, organisation and email address and use a double opt-in to ensure consent. We use a third-party provider, Mailchimp, to handle the data of newsletter recipients. Mailchimp is covered by Privacy Shield. Our newsletters all contain an unsubscribe button, so that readers can at any time remove themselves from the list. Otherwise, we assume they wish to continue to receive our newsletters until they tell us otherwise. We do not share the names or contact details of people who sign up with any other organisation apart from Mailchimp. The grounds for collecting, storing and processing this data is that of informed consent.

**People who contact us via social media**

People can follow us on Twitter or link to our LinkedIn page. We may sometimes use a third-party provider, Hootsuite, to manage our social media interactions.

If you send us a private or direct message via social media the message may be stored by Hootsuite for three months. It will not be shared with any other organisations.

**People who use our services**

When we do business with someone representing a client organisation, we need to record and store their contact details to enable client management and contract delivery. This can include their name, job title, organisation, telephone, work address and the email address they have provided. This data processing is necessary for the delivery of a contract and we rely on our legitimate interest to store and process it. The data is held for the duration of the contract and for 6 years following its conclusion, in order to comply with HMRC record keeping requirements.

**Job applicants, current and former employees and associates**

When individuals apply to work for or with our company, we will only use the information they supply to us to process their application. We also take up and keep on file professional references, as well as copies of their qualifications. These details may be stored electronically and on paper.

Personal information about unsuccessful candidates is held for 6 months after the recruitment exercise has been completed and is destroyed or deleted.

Once a person has taken up employment or an associate consultant position with us, we will set up a file relating to their relationship with us. The information contained in this will be kept securely and will only be used for purposes directly relevant to that person’s employment or subcontracted work. It is not shared with third parties. Once their work relationship with us has ended, we retain the file in accordance with the requirements of our retention schedule and then delete it or destroy it.

The grounds for processing this data are that it is in our legitimate interest to do so.

**Fundraising Research**

Occasionally, we are asked by client charities to identify or research individuals who may be interested in donating to the charity or not-for-profit organisation. In this regard, we act as a data processor and we may also use sub-contractors to deliver this work. This typically involves reviewing publicly available information (put into the public domain by the data subjects themselves) and producing a report. This work relates only to so called “high net worth individuals” and may sometimes include elements of sensitive personal data (or “special categories”). The information we collect is then provided to the client charity (the data controller), which may subsequently approach the people identified, at which point they give them the option to opt-out of any further contact or research. The data we collect is stored in password protected electronic files and deleted 3 months after delivery to the client charity. It is not retained or sold on to other organisations. We are happy to hear from people who do not wish to be the subject of any prospect research that we undertake, so that they can opt out of any future research. The grounds for processing this data are that it is in our legitimate interest to do so as part of our business relating to fundraising research.

**Complaints or queries**

We try to meet the highest standards when collecting and using personal information. We encourage people to bring it to our attention if they think that our collection or use of information is unfair, misleading or inappropriate. We would also welcome any suggestions for improving our procedures.

This information notice and data protection policy was drafted with brevity and clarity in mind. It does not provide exhaustive detail of all aspects of our collection and use of personal information. However, we are happy to provide any additional information or explanation needed. Any requests for this should be sent to the address below.

If after contacting us about data issues, a data subject still has grounds for complaint, they are able to take the matter up with the Information Commissioner, with which we are registered.

**Access to personal information**

We are very happy to give people access to their personal information if we hold it. Individuals can find out if we hold any personal information by making a ‘subject access request’ by post or email. If we do hold information about you, within one month we will:

* give you a description of it;
* tell you why we are holding it;
* tell you who it could be disclosed to;
* let you have a copy of the information in an intelligible form.

To make a request to us for any personal information we may hold you need to put the request in writing addressing it to our Data Protection Officer at the address provided below. Please provide your name, address, telephone number and email address.

If you agree, we will try to deal with your request informally, for example by providing you with the specific information you need over the telephone.

If we do hold information about you, you can ask us to correct any mistakes by, once again, contacting our Data Protection Officer.

Data subjects are not under any legal obligation to provide us with personal data, except for the preparation of legal contracts, where these apply.

**Disclosure of personal information**

In most circumstances, we will not disclose personal data without consent, unless we are relying on our legitimate interest (for example, to carry out fundraising research), or where the law requires it. However, when we investigate a complaint, for example, we may need to share personal information with the organisation concerned and with other relevant bodies.

**Links to other websites**

This privacy notice does not cover the links within this site to other websites. We encourage you to read the information notices on the other websites you visit.

**Changes to this privacy notice**

We keep our information notice under review. This information notice was last updated on May 2nd 2018.

**ICO Registration**

We are registered with the Information Commissioner’s Office and our entry can be found on the ICO’s website, for which we pay an annual subscription fee.

**How to contact us**

If you want to request further information about our use of personal data, you can email us on [info@wgconsulting.co.uk](mailto:info@wgconsulting.co.uk), ring us on 01785 663600 or write to:

The Data Protection Officer

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