

# Lake District Calvert Trust

## Privacy Notice (v5)

This privacy notice describes how The Lake District Calvert Trust (reg. charity 270923) and The Friends of the Calvert Trust (Lake District) (reg. charity 1067899) use your personal information.

We are committed to protecting and respecting your privacy.

For the purpose of the Data Protection Act the data controller is The Lake District Calvert Trust, Little Crosthwaite, Keswick, Cumbria. CA12 4QD.

The Lake District Calvert Trust operates a number of different centres and services and use trading names to distinguish them. These include Calvert Lakes, Calvert Reconnections and Calvert Stables.

Questions, comments and requests regarding this privacy policy are welcomed and should be sent to [enquiries@calvertlakes.org.uk](mailto:enquiries@calvertlakes.org.uk) or The Lake District Trust, Little Crosthwaite, Keswick, Cumbria. CA12 4QD.

We may update our privacy notice occasionally in order to ensure it matches our policy and procedures. You can check for the latest version of our privacy notice on our websites where it will be published at [www.calvertlakes.org.uk](http://www.calvertlakes.org.uk) & [www.calvertreconnections.org.uk](http://www.calvertreconnections.org.uk)

### What does this privacy notice apply to?

Personal information is any data that can be used to identify an individual, such as a name, address, phone number or email

This policy covers all personal information we hold about you, however we obtain it. We collect information at different points during our relationship with you for example, when you browse our websites, when you book or enquire about Calvert Trust courses or services, when you visit our facilities, if you contact us, if you sign up to our marketing communications, if you volunteer with us or if you support us with a donation or gift.

### What information does the Trust collect and why?

We collect different information depending on what you want to do and how you interact with us. We need to tell you what we use your information for and the reason why we use it.

- 1. Information you give us.** You may give us information about you such as your name, address, contact details, financial and credit card details, date of birth, medical information, gender and ethnicity by -
  - Filling in forms on our website
  - Corresponding with us by phone, email or otherwise
  - When you purchase services from us including booking a residential visit, day activities, accommodation services, pool sessions or riding sessions
  - When you request or register to receive information from us
  - When you provide us with feedback, report a problem or make a complaint
  - When you volunteer for us or participate in a fundraising activity
  - When you support us by making a donation, join the Friends of the Lake District Calvert Trust or attend a fundraising event

**2. Information we collect about you.** When you interact with us we may automatically collect the following information.

- Our website uses cookies to distinguish you from other users of our site. This helps us to provide you with a good experience when you browse our site and helps us to improve our site. Our site is not enabled to track usage via cookies, except for the use of google analytics. Information on Google Analytics privacy policy can be found here <https://support.google.com/analytics/answer/6004245>
- If you utilise our services we may record dates and times that you made use of our services for you and anyone accompanying you in order to meet our legal or contractual requirements
- If you interact, are supervised or receive instruction from our staff then we may make a record of that interaction to help us improve how we interact with you in the future and to ensure we provide you with the best possible service
- If you or someone with you have are involved in an incident, accident or report a problem then we may make a record of the event in order to meet our legal or contractual requirements and to improve experiences and safety in the future

**3. Information we receive from other sources.**

- If someone else arranges services from us that you participate in then we may require them to provide us with your personal information in order to ensure that we can meet our contractual requirements and to ensure your safety when you are with us
- If you make a donation via a third party then we may request your personal information in order to ensure that we can provide an acknowledgement, report on what your donation has achieved or meet our legal or contractual requirements
- If you volunteer for us then we may undertake a check with the Disclosure and Baring Service (DBS) or other relevant authorities and request information from referees in order to meet our contractual or legal requirements
- If you make use of our wi-fi network then information may be collected by the service provider, Cloudtrax, in order to meet our legal or contractual requirements and to improve experiences and safety in the future. Information on the Cloudtrax privacy policy can be found here <https://ct4.cloudtrax.com/privacy>

## **What do we do with your information?**

We may use the information we hold about you in the following ways –

- To carry out our obligations to you arising from any contracts entered into between you and us and to provide any services or information that you may request
- To carry out our obligations to you arising from any contracts entered into on your behalf by a third party and to provide any services or information that you may request
- To analyse and monitor usage of our services and activities by different demographics in order to produce anonymised reports on the charities beneficiaries and supporters
- To keep our services and activities safe and secure and to prevent or detect fraud or other criminal behaviour
- To promote the public benefit and the wider impact of the charity
- To inform you as a previous or prospective beneficiary of the charity of services, opportunities or events that may be of interest to you.
- To inform you as a previous or prospective supporter of the charity of events or appeals that may be of interest to you.

## Marketing & Fundraising Communications

So that you are kept informed about our courses, events, activities and facilities, we may send you information by post or telephone (unless you have asked us not to do so).

If you have given us your consent to receive communications by email, are a customer of ours or you have previously asked us for information about our courses or have previously supported the Trust with a donation we may also send you this information by email. However, in every email message we send you, we will give you the opportunity to unsubscribe from our mailings altogether.

We also use your personal information to tailor the marketing and fundraising communications we send to you. For example, we use your booking history with us in terms of the types of courses to identify your preferences. This enables us to provide you with a more personalised service, and give you information about courses and activities which are more likely to be of interest to you.

We do not provide your personal information to external organisations for their own marketing or fundraising purposes without your explicit consent.

If at any time you do not want your information used for direct marketing or fundraising purposes or if you decide that you no longer wish to receive emails from us, please either follow the unsubscribe link in one of our email messages or contact us at [enquiries@calvertlakes.org.uk](mailto:enquiries@calvertlakes.org.uk). Please note that if you have a forthcoming booking we will send you service related emails, even if you have unsubscribed from marketing communications as this is important information you will require for your visit.

## Who do we share this information with?

Your personal information may be shared between the Lake District Calvert Trust and The Friends of the Lake District (Calvert Trust) because we operate centralised systems.

We may share your personal information with our suppliers carrying out work on our behalf, which covers companies such as IT services, banking services, financial service providers, consultants, marketing agencies and communications providers. We will only share personal data with them if they have signed a contract with us that requires them to abide by the requirements of the Data Protection Act, treat your information as carefully as we would, only use the information for the purpose which it was provided and allow us to carry out checks to ensure they comply with these requirements.

We use E-Tapestry as our Customer Relationship Management (CRM) system to manage our fundraising contacts database. E-Tapestry is a subsidiary of Blackbaud a company based in The United States of America. Blackbaud are certified with the EU-US Privacy Shield agreement in order to keep your data secure and to comply with GDPR. Details of the Blackbaud Privacy Policy can be found at <https://www.blackbaud.co.uk/privacy-policy.aspx>

We use Cinolla as our CRM system to manage our Calvert Lakes contacts database. Cinolla Software Limited is a company based in the United Kingdom and will not transfer data outside of the EEA. Details of the Cinolla Privacy Policy can be found at <https://www.cinolla.com/privacy-policy/>

We use Care Control as our CRM system to manage our Calvert Reconnections contacts database. Care Control Systems Limited is a company based in the United Kingdom but the data that we collect from you may be transferred to, and stored at, a destination outside the European Union ("EU") by Care Control. It may also be processed by staff operating outside the EU who work for Care Control or for one of their suppliers. Care Control take all reasonable steps to ensure the security of data and their privacy policy can be found at <https://carecontrolsystems.co.uk/privacy-policy/>

We use Xero as our financial record keeping system. Xero is a global company but here in the UK the data controller is Xero (UK) Limited. Being an international company, this means that your data may be transferred outside of the EEA. Where your personal data is transferred outside the EEA, it will only be transferred to countries that have been identified as providing adequate protection for EEA data, or to a third party where we have approved transfer mechanisms in place to protect your personal data, for example, by entering into the European Commission's Standard Contractual Clauses. Details of the Xero privacy policy can be found at <https://www.xero.com/uk/legal/privacy/>

We use Microsoft Office 365 products including as our email provider. Microsoft is a global company and your data may therefore be transferred outside of the EEA. Microsoft adheres to the principles of the EU-U.S. and Swiss-U.S. Privacy Shield frameworks. Details of the Microsoft privacy policy can be found at <https://privacy.microsoft.com/en-gb/privacystatement>

We use Survey Monkey to obtain customer feedback. Survey Monkey is a product from Momentive Inc. who are a global company. Momentive Inc. participates in and has certified its compliance with the EU-U.S. Privacy Shield Framework and Swiss-U.S. Privacy Shield. Momentive is committed to subjecting all personal information received from the European Union (EU) member countries, the United Kingdom, and Switzerland, in reliance on the Privacy Shield Framework, to the Framework's applicable Principles. Details of the Survey Monkey privacy policy can be found at <https://www.surveymonkey.co.uk/mp/legal/privacy/>

We occasionally support research carried out by reputable organisations and institutions. We will only ever share your data in a manner which does not personally identify you as an individual or which allows our research partner to identify you as an individual.

We may disclose information to third parties if we are under a duty to disclose or share your personal data in order to comply with any legal obligation, detect fraud, in order to enforce or apply our terms of use and other agreements or to protect the rights, property, or safety of the Calvert Trust, our customers, or others.

Apart from the circumstances above, we will never share your personal data with third parties without your explicit consent to do so.

## **How long do we keep your information?**

We only hold your personal information for as long as is necessary to provide services to you unless there is a requirement to hold that information for a longer period – for example our insurers require us to hold certain information for certain periods of time, or we may be subject to a statutory obligation to keep hold of your information.

If there is a possibility that you or a member of your group may have a legal claim against us, for example if you or your group have been involved in an accident or incident while with us, then we will hold your information for the duration of any statutory limitation period associated with such legal claims.

## **How do we keep your personal information secure?**

Information we hold is stored on computers located in the UK and may also be stored as paper copies by us.

We are committed to ensuring that your information is secure. In order to prevent unauthorised access or disclosure we have put in place suitable physical, electronic and managerial procedures to safeguard and secure the information we collect, including locked cabinets, data encryption and electronic password protection.

## Your rights

The Data Protection Act gives you the right to –

- Access information held about you, although we can refuse or charge for requests that are manifestly unfounded or excessive
- Have inaccurate personal data corrected or erased
- Object to our collection, processing or storage of any personal information that we hold about you

You may make the request in writing or by email to The Lake District Calvert Trust at the contact details below. We will respond within 30 days.

Subject Access Request  
Lake District Calvert Trust  
Little Crosthwaite  
Keswick  
Cumbria. CA12 4QD.  
Email: [enquiries@calvertlakes.org.uk](mailto:enquiries@calvertlakes.org.uk)

If you submit your request via email, please send it to [enquiries@calvertlakes.org.uk](mailto:enquiries@calvertlakes.org.uk), with “Subject Access Request” in the subject line. Sending it without this wording or to an alternative email address, such as that of an individual member of staff, will not guarantee your request prompt attention.

More information on your rights under the Data Protection Act can be found on the website of the Information Commissioners Office at [www.ico.org.uk](http://www.ico.org.uk)