

Privacy Policy

Alveo Consulting Limited is a boutique consultancy firm that offers services to not-for-profit organisations to transform their operations. We combine expertise in operational effectiveness with a practical, enabling approach, to improve fundraising efforts within universities, arts & cultural organisations and charities.

We are committed to maintaining your confidence and trust with respect to your privacy. Our principles are simple – we will be transparent about what data we are collecting about you, the sources of that data, how we use the information we hold about you, and the choices you can make.

We collect personal data on our clients, their employees and our other contacts for the purposes of maintaining our relationship with them and fulfilling our contracted role.

Information we collect

We collect information from you in three ways: directly from you during your ongoing relationship with us, from your employer, or from publicly available sources, such as LinkedIn. The amount of data we collect depends on the frequency and nature of your interactions and engagement with us.

We may hold and process the following types of personal data about you:

- name, title, contact details
- employment details, incl. current and past employer, and job titles
- publicly available profile pictures, where copyright allows, e.g. a photo of you from your LinkedIn profile or company website
- links to your public social media presence, e.g. LinkedIn, Twitter, website or blog
- records of your personal interactions with us, e.g. correspondence, notes of meetings or conversations
- your communication preferences; records of communications you have received from us, incl. copies of letters or emails sent, and of marketing activities in which you have been included
- information about how you interact with our email communications
- your relationships with other of our contacts, e.g. work colleagues
- information about current or past projects we have worked on with you, or enquiries you have made to us
- plans for activities, future interactions and next steps
- records of any thank you gifts we have sent to you

We do not hold any sensitive personal data.

How we use your data

In pursuit of our business interests we use personal data to manage our relationship with clients and potential clients, and to send news of interest about our firm and its services, and about broader areas of interest to clients. We may do this by post, telephone or email. Those who provide us with email addresses will be sent our e-news from time to time. We may, on occasion, use an email provider, such as Mail Chimp, to send e-marketing. Each newsletter contains an unsubscribe option and we can also remove you from the list if you send a request to our head office whose contact details are below.

When and how we share your data

We may, from time to time, need to share your information with third parties working on our behalf, for example associate consultants. We only do this in appropriate circumstances, by secure means, and with the relevant appropriate data sharing agreement in place before sharing your personal data. We do not, and will not, sell your data.

How we protect your personal data

We take the security of your data very seriously. We take precautions to safeguard your personal information against loss, theft and misuse, unauthorised access, disclosure and destruction through the use of appropriate administrative, physical and technical security measures.

Your data is stored on our relationship management system 'Insightly' which is a cloud based, SOC 2 Type 2 compliant CRM. There is detailed information here about their approach to security:

<https://www.insightly.com/architecture-security/>

Some personal data (name, contact details and employment details) are also stored in our accounting system, Xero. Data are encrypted using industry-standard data encryption, multiple layers of firewalls are in place, all access to their data centres and servers is controlled and monitored 24/7. More details about their approach to security are available here: <https://www.xero.com/uk/about/security/>

You should be aware that in the case of both of these systems, data will be transferred outside of the EEA to servers hosted in the US. They both have in place transfer mechanisms with their hosting providers that satisfy the requirements relating to the transfer of data from the European Union to the U.S. governed by appropriate contractual clauses. Insightly is also EU-US Privacy Shield certified.

How long we keep your data

We consider our relationships with potential, current and past clients and other contacts to be enduring and we will retain much of your data indefinitely unless you request otherwise.

The legal basis for processing your data

Alveo Consulting Limited is the Data Controller for the personal data we hold on you. We rely on three grounds for lawful processing:

- For the purpose of administering contracts with clients, to the extent that we process personal data we do so because it is necessary for the administration of a **Contract**.
- For our marketing and other promotional activity we process data because it is in our **Legitimate Interest**
- Where we are communicating with you via your personal email address, rather than a company email address, we rely on your **Consent** to do so. You can withdraw this consent at any time.

We are registered with the ICO as a Data Controller.

Your rights

You have a number of rights in respect of your data:

- If we are processing data with your consent then you have the right to withdraw that consent without prejudice.
- If we are processing data because it is in our Legitimate Interest to do so then you have the right to require us to stop such processing.
- You have the right to request a copy of any data we hold about you or to request that we correct any incomplete or inaccurate data.
- You have right to request the transfer of your data to another party.
- You have the right to complain about the way in which we process your data. Contact details for this are below.
- You also have the right to complain to the Information Commissioner about the way in which we have processed data. Contact details are at www.informationcommissioner.org.uk

Contact details

Contact us with any queries about your data or this Privacy Policy at:

Data Protection Officer

Alveo Consulting Limited

18 Chadwick Manor, Warwick Road, Knowle, Solihull, B93 0AT

Tel: 0203 865 3600

Email: enquiries@alveoconsulting.co.uk

Changes to this Privacy Policy

We reserve the right to update this Privacy Policy at any time. Any changes to this Privacy Policy will be posted to our website.

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