

Data protection 'Top Tips' for BHF Fundraising Volunteers

Special Category Information (or Sensitive information)

Only collect sensitive personal information from supporters, such as health conditions, sexuality, race, or ethnicity where absolutely necessary, and be upfront about why you are collecting this information. If you become aware of sensitive personal information about another volunteer or supporter don't share this with anyone before speaking to your Fundraising Manager. If you require clarification about what constitutes special category information, again, please ask your Fundraising Manager.

Building address books

Please don't collect large sets of contact details over time, whether in paper form, as an address book, or in a spreadsheet. We suggest reviewing any records that you hold every year and deleting details of anyone who you haven't heard from in more than two years and not building beyond 100 records.

Consent to Contact

You must get consent from your supporters to contact them by email, phone or text if you want to promote fundraising events to them in future. Keep a record of which supporters are happy to hear from you. Record their name, contact details, how they would like to be contacted and the date they confirmed these preferences. We suggest using our 'Consent Tracker' template to keep accurate records and so you don't contact anyone by mistake.

Ongoing Consent

If an individual has opted-in to receiving communications, make sure that every time you contact them you also tell them how to let you know if they'd like to stop receiving emails or change the way they hear from you. For example, with email we'd suggest including a sentence at the bottom to say: "This email is sent by a British Heart Foundation volunteer on behalf of [insert group/branch name]. If you don't want to receive any more emails from the group, let us know by contacting this email [insert your email] or by calling [insert a

telephone number]. If a supporter does wish to remove their consent then please get in touch with your Fundraising Manager who will be able to update this on our systems.

Maintaining Records

Be sure to keep your records up to date and respect supporters' wishes. Acknowledge and action requests to update a supporter's record or change their communication preferences in a timely way, to be sure you only promote events to people who have given you consent to contact them in the way they said they wanted to hear from the group.

Legitimate Interests

If you are contacting supporters by post, you don't need their prior consent to contact them for marketing purposes as you can rely on what is known as the BHF's 'legitimate interest'. Further info can be found in our 'Q&A' note. Always contact your Fundraising Manager if you want further clarification on contact preferences. They will be able to check on our system that a supporter hasn't objected to receiving mailings.

Storing and Sending data

Access: Be clear about who has access to the personal information you hold as a group and make sure that this is limited to necessary people only.

Security: Hold personal information about supporters, donors or other volunteers securely, either on a password-protected computer/ device or in a locked drawer.

Passwords: Never share system passwords with anyone else and don't write them down. You must create a strong password that is made up of letters, numbers and symbols – to protect all files containing personal data

Paper forms: Hard copy forms should be sent to CSC to be processed. Delete or shred files containing personal information which are no longer needed. Any records you hold in paper form should be shredded after two years.

Emailing supporters: When emailing groups of supporters or event attendees, it is essential that you blind copy recipients (bcc) rather than copying (cc) to avoid sharing contact details openly. Failure to do so would break data protection regulations.

Sending spreadsheets: Password-protect any spreadsheets of data before emailing them to anyone and communicate the password separately by phone or email. If you are emailing a mailing list – don't also email the password – if the email account is hacked the hacker will get both the password and the spreadsheet.