

Annex C: Alumni and Supporters

We will collect many types of information about you. The information below is a summary of the types of data we will collect, our reasons for collecting this data, the lawful basis on which we will process this data and the period of time for which we will retain this data. Full information about our processing of your data is set out in the attached Register of Processing Activity and we strongly recommend that you consult this.

For the avoidance of doubt, alumni and supporters includes (but is not limited to) those who previously studied at or were employed by the College, Visiting Fellows, Honorary Fellows, Associate Members of the Senior Common Room and those who are affiliated with the College but were never students or staff of the College. [In addition to those holding positions in the Chapel].

Categories of personal data we collect about you and why we collect it

The sorts of personal data we collect about you include records of or information about:

- Your contact details as amended from time to time, to enable us to contact you and maintain our relationship with you.
- Donor Strategy Records and legacy documentation, to undertake development and alumni processes and to enable us to follow expressed wishes.
- Rights to use College facilities e.g. library access and dining rights, right to use the College Chapel, to enable the College to recognise, and you to exercise, your alumni rights.
- Records of College cultural life during your time as a College student, in order to maintain a record of College life.
- Biographical information including interests, family news and educational history, in order to understand your interests and deepen our ongoing relationship with you.
- Your attendance at College and University events, donation history and your opinions/comments, to help guide College development and alumni relations activities, and to fulfil charity and auditing and reporting requirements.
- Public awards and honours received by alumni, to recognise the achievements of our alumni body.
- Subjects you studied and type of degree awarded (but not your results), to enable us to invite you back to events which may be of interest, and details of prizes or scholarships awarded, information about health, dietary requirements or disabilities.

Sources of your personal data

Most data are generated by us or obtained from you. We may also obtain data from the University of Oxford or third parties, including other alumni.

The legal basis on which we process your data

Legitimate interests

In some cases, the College may need to process your data for the College's or someone else's legitimate interests, except where this is overridden by your data protection rights and freedoms. The College's legitimate interests include the proper operation of College facilities, ensuring alumni and supporters receive an appropriate service, recording and retaining information on funds received, seeking donations, having an engaged and positive alumni programme and maintaining records of College cultural life. The College and its students have a legitimate interest in deepening the alumni relationship. The College has a legitimate interest in keeping records of students, fellows

and others that are affiliated with the College to ensure those intending to take advantage of opportunities only open to previous students and fellows, such as right to use the Chapel for a private event, can be facilitated.

Compliance with a legal obligation

In some cases, the College must process your data in order to comply with a legal obligation.

Performance of tasks in the public interest

The College has a substantial public interest in processing special category data. Such interests include preventing a breach of obligations under various laws including equality law.

Your consent

In certain circumstances, we may need your consent to process biographical information about you. You will be asked for such consent at the relevant time.

Additional information including processing of data relating to criminal convictions

The College will hold information about criminal convictions or allegations where incidents are alleged to have occurred on College property, or involved members of, or visitors to, the College. All such processing meets a condition in Part 2 of Schedule 1 to the Data Protection Act 2018.

Your personal data are used by us for the following purposes in support of alumni and supporter relations, and fundraising:

For alumni and supporter engagement

- To manage our ongoing relationship with you and to provide a record of your interactions and contributions to college and University life.
- To offer and manage a varied programme of events tailored to your interests, including networking events, subject reunions, Gaudy dinners, sports events, concerts, seminars and lectures.
- To keep you up to date with news from Exeter.
- To provide you with information about alumni benefits and services.
- To let you know of volunteering opportunities, including linking current students with alumni for careers advice and internships, or speaking opportunities.
- To provide the most relevant content and best possible user experience when you are interacting with our digital communications and platforms.
- To identify and profile potential volunteers, alumni ambassadors and event attendees.
- To accept and process commercial revenue, e.g. for merchandise or event tickets.
- To undertake surveys and market research.
- To create classifications and groupings (through manual or automated analyses) in order to best direct engagement activities.
- To analyse the success of our engagement activities, collect feedback, and manage complaints.

For all fundraising and donor stewardship

- To help ensure that our fundraising efforts are conducted as efficiently as possible, and that our approaches to potential donors are respectful, professional, and made, as far as possible, based on evidence and an understanding of what may interest you.
- To ask you for your support for our fundraising programmes, always mindful of fundraising best practice.

- To accept and process philanthropic revenue.
- To provide acknowledgement, recognition and stewardship of your gift.
- To inform you of the impact of your gift.
- To create classifications and groupings (through manual or automated analyses) in order to best direct fundraising activities.
- To support peer-to-peer fundraising campaigns, during which alumni data may be shared with other alumni of Exeter.
- To inform fundraising, marketing and donor stewardship strategies.

For fundraising for major gifts

- In addition to analysing data shared with us, we may use publicly available information and recommendations from staff and supporters to identify individuals who we believe may have the interest and financial capacity to make a major gift.
- Where we have reason to think a potential donor may possess an interest and financial capacity to donate, we may research and collate additional information from sources in the public domain, typically concerning a potential donor's interests in so far as they may coincide with our work, their philanthropic activity, financial capacity and networks in order to substantiate this. We may undertake this research ourselves or use the services of a third-party partner, for example Prospecting for Gold or Lagotto Solutions. This new information may be added to the record of a donor or potential donor.
- Where this activity is being undertaken for a new contact with whom we have no previous relationship, we will provide the individual with a link to this privacy notice as part of our initial engagement.
- Information may be collated into a briefing or profile in order to assist the planning of an approach to a potential donor to discuss that individual's interest in our work and in supporting it.
- We may also carry out due diligence on potential donors using publicly available information in order to comply with our policy on the acceptance of gifts, and to fulfil our legal responsibilities.

How and when Exeter shares your data

We may, from time to time, need to share your personal data within the collegiate University of Oxford or with third-parties working on our behalf. We will only do this in appropriate circumstances, by secure means, and with the relevant data sharing agreements in place. We do not, and will not, sell your data.

Third parties will only process your personal data on our instructions and where they have agreed to treat your data confidentially and to keep it secure. We only permit them to process your personal data for specified purposes. We do not allow our third-party service providers to use your personal data for their own purposes nor to keep your data after the processing is complete. All our third-party service providers are required to take appropriate security measures to protect your personal information in line with our policies.

Whenever your information is shared, we will always seek to share the minimum amount of information necessary to fulfil the purpose, this includes the use of anonymised or pseudonymised data where that is sufficient.

Your data may be shared in the following ways:

Within the collegiate University of Oxford

We may share your data with colleges and departments that make up the collegiate University. We will do this only where it is necessary in order to carry out any of the purposes listed in this privacy notice. For example, where the University is coordinating with one or more colleges to organise shared events to which you are invited; to manage and coordinate relationship management activities with you; to ensure your contact information is up-to-date, to distribute to your college any gifts received via the University's payment methods.

We may also share relevant data, in appropriate circumstances, with college or University Sports Clubs and Societies where you are (or were) a member of that club or society.

With organisations or individuals affiliated to Exeter

We benefit from a network of organisations and individuals who volunteer their support to Exeter. We may share relevant data with them, in appropriate circumstances, by secure means, and with the relevant data sharing agreements in place. These may include:

- Volunteers offering their expertise by serving on boards or otherwise advising on or assisting with alumni or development matters.
- Recognised University or college alumni societies and networks, for example when they are helping to organise a dinner or host an event to which you are invited.

With partner organisations that accept gifts in support of Exeter

The following organisations enable tax-efficient giving to Exeter and the collegiate University of Oxford, from outside of the UK. Data may be shared by us with these organisations where it relates specifically to donations you have made, or have pledged to donate via these organisations.

- Americans for Oxford, Inc. (AFO) accepts gifts in support of the collegiate University of Oxford. AFO has been determined by the United States Internal Revenue Service to be a tax-exempt public charity. The personal data you provide when making a gift to AFO are collected and processed by the University of Oxford's North American Office using the shared Development and Alumni Relations System (DARS).
- Swiss Friends of Oxford (SFOU) Swiss residents can give tax efficiently to the collegiate University of Oxford. SFOU is set up as an association (Verein) under Swiss law and has a tax ruling from the canton of Zug recognising its tax-exempt status.
- German Friends of Oxford University Residents of Germany can also make tax-efficient donations to the collegiate University of Oxford via the German Friends of Oxford University without incurring any fees.

With third-party organisations engaged by Exeter to provide services:

These include but are not limited to:

- Mailing houses, printers, fundraising consultancies (either Buffalo Fundraising Consultants LTD or Rux Burton Associates), event organisers or venues.
- Organisations providing tools such as relationship- or event-management systems; databases and reporting/analysis tools; alumni networking or crowdfunding platforms; email or survey tools; payment services (e.g. direct debit, online donation processing).
- Organisations assisting with activities such as market research, marketing and communications, organisational effectiveness, strategy and planning, auditing, business intelligence and analysis (including wealth screening), customer experience.

Retention of your data

The period for which we retain your data will depend on the specific type of data. Some data will be retained permanently whilst other personal data will be deleted after a set period of time has elapsed. We recommend that you consult the College [Register of Processing](#) Activities for details regarding the retention period for specific categories of data. Some of the data we process about you will be recorded in the College's archives. For further information about the type of data that is archived and the respective retention periods, please see [Annex D - Archives](#).