# Citizens Advice Richmond: Privacy Policy

# February 2025

**1. Introduction**

At Citizens Advice Richmond, we are committed to protecting your privacy and ensuring the security of your personal information. We follow the national “Citizens Advice Privacy Policy”, which can be found here - [Citizens Advice privacy policy - Citizens Advice](https://www.citizensadvice.org.uk/about-us/information/citizens-advice-privacy-policy/). This policy, together with the national policy, explain how we collect, use, share, and store your personal data in compliance with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018.

**2. Why We Collect Your Information**

We collect and use your personal information to:

* Provide you with free, confidential, and independent advice and support.
* Improve our services and tailor them to your needs.
* Identify and address wider issues affecting our community.
* Carry out research and analysis to inform our work.
* For fundraising
* For recruitment purposes (both staff and volunteers)
* Meet our legal obligations under UK GDPR and other relevant laws.

**3. What Information We Collect**

We collect the following types of personal information:

* Information you provide to us directly: This includes your name, contact details, date of birth, details about your circumstances and the issues you are facing.
* Information we collect automatically: When you use our website or online services, we may collect information about your device, IP address, and browsing activity. We will always inform you if we do so and explain why.
* Information from third parties: In some cases, we may receive information about you from third parties, such as other advice agencies or government departments, but only where there is a legal basis for doing so under UK GDPR.

**4. How We Use Your Information**

We use your information to:

* Provide advice and support: We use your information to understand your needs and provide you with relevant and accurate advice.
* Improve our services: We analyse data to identify trends and areas where we can improve our services.
* Research and analysis: We use anonymized data to conduct research and analysis to inform our work and advocacy efforts.
* Legal obligations: We may process your data to comply with legal obligations, such as court orders or requests from regulatory bodies.

**5. Sharing Your Information**

At times we might use or share your information without your permission. We'll only do this if there's a legal basis for it. This could include situations where we have to:

* Follow the law, called 'legal obligation' - for example, if a court orders us to share information
* To protect someone's life, called 'vital interests' - for example, sharing information with a paramedic if a client was unwell at our office
* To carry out our aims and goals as an organisation, called 'legitimate interests' - for example, to create anonymous case studies and statistics for our national research
* For us to carry out a task in the public interest or for our official functions, and the task or function has a clear basis in law, called 'public task' - for example the Consumer Service
* To carry out a contract we have with you, - for example, if you're an employee or a donor, we might need to store your bank details so we can pay you
* To defend our legal rights - for example, to resolve a complaint that we gave the wrong advice

We may share your information with:

* Other organisations: We may share your information with other organisations that can provide you with additional support, but only with your consent.
* Our partners: We may share anonymized data with our funders and partners to report on our activities and demonstrate the impact of our work.
* Service providers: We may share information with our service providers, such as IT providers, banks or payroll processors, who assist us in delivering our services and fundraising.

**6. Working on your behalf**

When you give us authority to act on your behalf, for example to help you with a Universal Credit claim, we may need to share information with the third parties. We commonly share information with: The Department for Work and Pensions, Richmond Council, Richmond Housing Partnership and other housing associations that operate in the borough, if you are their tenant or leaseholder. We also share information with other organisations offering advice or other services, if we refer you to them for help.

**7. Storing your information**

We will only keep your personal information for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements. Please note that we don’t keep client data for more than 6 years.

We store paper files at our offices in Richmond borough. We store most electronic data on the national Citizens Advice case management system ‘Casebook’. We use the Citizens Advice Adviceline platform to manage our phone help line and record calls. We use a website hosting company and Microsoft Office 365 for emails, online enquiries and storing data.

**8. Your Rights**

You have the following rights in relation to your personal data under UK GDPR:

* Right of access: You can request access to the personal information we hold about you.
* Right to rectification: You can ask us to correct any inaccurate or incomplete information we hold about you.
* Right to erasure: You can ask us to delete your personal information in certain circumstances.
* Right to restriction of processing: You can ask us to restrict the processing of your personal information in certain circumstances.
* Right to object: You can object to the processing of your personal information based on legitimate interests or for direct marketing purposes.
* Right to data portability: You can ask us to transfer your personal information to another organization in a structured, commonly used, and machine-readable format.

**9. Contact Us**

If you have any questions about this privacy policy or how we handle your personal information, please contact us:

* Phone: 020 8891 0597 (open during office hours); we cannot give advice on this number.
* Email: advice@citizensadvicerichmond.org; we cannot give advice on this email.

**10. Data Security**

We have implemented appropriate technical and organizational security measures to protect your personal information against unauthorized access, loss, or destruction.

**11. Cookies**

Our website may use cookies to enhance your browsing experience. You can adjust your browser settings to manage cookies.

**12. Updates to this Policy**

We may update this privacy policy from time to time. Any changes will be posted on our website.

**13. Joint Data Controllers**

Citizens Advice Richmond and the national Citizens Advice charity operate a system called Casebook to keep your personal information safe. This means we are a 'joint data controller' for your personal information that's stored in our Casebook system.

**14. Information Commissioner's Office**

You can find out more about your data rights on the Information Commissioner's website.