Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2		tion of	Questio Catego Categori ns/futu ries of es of re Individ Personal	sensitiv work to identify third parties]	of the	tion e of	Prote	cti Protect	io of third	rds for		Applicable security measures (if possible)	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
Relations	Accept and Process Commercial Revenue	Purchase of merchandise	Process payment for merchandise	Contract		re indivia Personal Alumni Name Contact Donors Details Informat Suppor ion ters; required Studen to make ts; payment Parent (incl. s; credit or debit card details)	university shop (WPM); other 3rd Par payment services providers; Bursary/Finance team for PDQ/cash/cheque payments.			01				7				delete
Relations		Purchase of tickets to fund (or part fund) the cost of events.	Process payments for events tickets	Contract		Alumni Name ; Contact Donors Details ; Informat Suppor ion ters; required Studen to make ts; payment Parent (incl. s; credit or debit card details)	University shop (WPM); other 3rd Par payment services providers; Bursary/Finance team for PDQ/cash/cheque payments.	УУ						7				delete
Relations	Accept and Process Philanthropic Revenue		Notification of new gifts to colleges (email to nominated individual at college)		To ensure donatio ns are process ed and acknowl edged in a timely manner and used for the purpose s for which they were given and to maintai n require d financial records.	Alumni Donor , ID; Donors Name; Contact Suppor ters studied; matricul ation year; Gift Amount and frequenc y if direct debit, start date, Gift Aid eligibility , fund to which donation has been.	College representatives. College development office/finance/accounts/bursary							7				delete

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2			Questio Cate ns/futu ries			Categories of Recipients [NB: More work to identify third parties]		oca Existenc D on e of P					Applicable security measure	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
Developmen	Accept and	Administration around donation processing	Post and Export Data to General Financial Ledger/other	Processing		re Indiv	vid Personal	e	Data is recorded in the DARS database	data, if of	Automa o	n Im	pact countri	exceptio	possible) 7	(if possible)			delete
t & Alumni Relations	Accept and Process Philanthropic Revenue	Administration around donation processing	Post and Export Data to General Financial Ledger/other relevant financial system to transfer/allocate philanthropic revenue to the appropriate destination requested by donor (e.g. colleges, departments, research projects).	Contract		re India Alum , Dono , Supp ters	nni ors oor	r L	Data is recorded in the DARS database where it can be accessed only by staff ir relevant roles and with relevant access. University: Oracle finance system Colleges: Bursary/Finance team relevant financial system.		Automa o	<u>)</u> n imr	pact countri	exceptio	possible) 7	(if possible)			delete
Relations	Accept and Process Philanthropic Revenue	Administration around donation processing	Reconciliation of bank statements with internal records of donations		To ensure donatio ns are process ed and acknowl edged in a timely manner and used for the purpose s for which they were given and to maintai n require d financial records.	Alum , Dono , Supp ters	ors	r L	Data is recorded in the DARS database where it can be accessed only by staff ir relevant roles and with relevant access. University: Oracle finance system Colleges: Bursary/Finance team relevant financial system.						7				delete

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2		tion of r	Questio Catego Categori ns/futu ries of es of	sensitiv work to identify third parties]	of the	tion e of	Protecti	Protectio of	third rds f		security measure	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
Developme t & Alumni Relations		Due diligence_donation acceptance	Undertake research relating to acceptance of gifts to ensure we don't accept money from individuals with whom the collegiate University would not wish to be associated with/money from criminal activity, etc due diligence	Processing Legitimate Interest and Legal Requirement t	d that collegiat	re Individ Persona Alumni May , include Donors informat , suppor ters criminal conviction , fraud, allegation onal informat ion conviction , fraud, allegation onal informat ion.	Internal senior staff involved in review	data, if	of Automa	L ON	n Impact. co	untri exce	possible) 7	(if possible)			delete
Developme t & Alumni Relations		Facilitating Tax Efficient Giving	Issue Canadian Tax Receipts for payments handled by Gift Registry and coming in directly to all colleges who obtain tax receipt number from Gift Registry and issue receipt including number.	requiremen	Enables n our US and Canadia n donors to reclaim the tax on their donatio ns.	Alumni , Donors , Suppor ters							7				delete
Developme t & Alumni Relations		Facilitating Tax Efficient Giving	Issue US tax receipts (OUDNA on behalf of AFO)	Legal requiremen t	Enables n our US and Canadia n donors to reclaim the tax on their donatio ns.	Alumni , Donors , Suppor ters							7				delete
Developme t & Alumni Relations		Facilitating Tax Efficient Giving	Process donations received via tax-efficient intermediary e.g AFO, other 501c3s, Swiss Friends, German Friends	Contract	Enables donors to give tax efficient ly	Alumni , Donors , Suppor ters							7				delete

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2		rip Questio Catego Categori Is of ns/futu ries of es of sens tim re Individ Personal e	sitiv work to identify third parties]	Source Loca Existenc Data Data Names Sa of the tion e of Protecti Protectio of third rds data, if of Automa on n Impact countril exist	s for schedule (if security measure	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
Developmen t & Alumni Relations	Accept and Process Philanthropic Revenue		Reclamation of Gift Aid - R68 Process including collection an recording of declarations, supply of data to HMRC and recording of gift aid received. Distribution of gift aid amounts to departments, colleges and sports clubs.	Processing Legit de Legal To requiremen ensu t all ta able unde the g aid schen is recei d by colle e Univi ty an that recei d got to th right place so dc ensu maxi m va is recei d fo gift.	Alumni Contact re , details im Donor Donor im Suppor Donor ID er ters Gift Aid im declarati on and me source of ive on (e.g. online, giat on (e.g. online, giat oral) tax Amount tax Amount of gift ee of gift es of gift inu amount amount amount ive amount amount <td>HMRC Shared with colleges as part of distribution process - donor name not shared if anonymity has been requested.</td> <td></td> <td>7 7</td> <td></td> <td></td> <td>delete</td>	HMRC Shared with colleges as part of distribution process - donor name not shared if anonymity has been requested.		7 7			delete
Developmen t & Alumni Relations	Accept and Process Philanthropic Revenue		Contactless donations. NB: this is desired way of collecting additional donations for Gardens, Libraries and Museums. Not yet in place.		rre , amount; titio Donors purpose; re , innarcial suppor informat nd ters ion required to process ly , edited to process ly , edited to process gift [e.g. credit card; card; bank account h details]; en nto to to	Potential vendor: Goodbox		7			delete
Developmen t & Alumni Relations		Administration around donation processing	Ensuring requirements for anonymity are met	Contract	Alumni Name , (stored Donors securely , either Suppor via access or out of system dependi ng on level of anonymi ty requeste d) Donatio n amount Purpose of donation			permanent			

	Process	Process_Sub Level 1				o Catego Categori <mark>Is</mark>	Categories of Recipients [NB: More					Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function					tion of ns/fut Legitim re	Individ Personal e	work to identify third parties]				for schedule (if possible)	s Schedule Condition for Processing	Processing	
Developmen	Accept and	Processing donations and pledges		Contract		Alumni Name;	Colleges; departments; may also share		Automa on	countri exce	7			delete
	Process		3rd parties: Campaign for Oxford Website; College website;		ensure	, contact	data with the third party to answer	ed third						
	Philanthropic		Crowdfunding/Community Fundraising Platform;		donatio	Donors details;	queries	party						
	Revenue				ns are process	, donation Suppor amount;	University Finance	vendors acting as						
					ed and	ters purpose;		data						
					acknowl	require		processo						
					edged	ments		rs such						
					in a timely	around acknowl		as Blackbau						
					manner	edgeme		d						
					and	nt/anon		Payment						
					used for the	ymity;		Services (BBPS);						
					purpose	financial		(BBPS); Hubbub;						
					s for	ion		Everyda						
					which	required		y Hero;						
					they were	to process		Cyberso urce;						
					given	gift [e.g.		IATS;						
					and to	credit		Blackbau						
					maintai	card;		d						
					n	debit card;		Merchan						
					require d	bank		Services;						
					financial	account		Stripe,						
					records.	details];		WPM,						
						relevant addition		WorldPa y; Paypal						
						al		(some						
						docume		colleges						
						ntation		use						
Developmen	Accept and	Processing donations and pledges	Process credit card donations via post or over phone using	Contract	To PCI	le.g. gift Alumni Name;		Paypal			7			delete
	Process		PDQ machines (including secure transfer to location where		ensure compli									
	Philanthropic		processed by PDQ)		donatio nce	Donors details;								
	Revenue				ns are process	, donation Suppor amount;								
					ed and	ters purpose;								
					acknowl	require								
					edged	ments								
					in a	around								
					timely manner	acknowl edgeme								
					and	nt/anon								
					used for	ymity;								
					the purpose	financial								
					s for	ion								
					which	required								
					they	to								
					were	process								
					given and to	gift [e.g. credit								
					maintai	card;								
					n	debit								
					require	card;								
					d financial	bank account								
					records.	details];								
						relevant								
						addition								
						al docume								
						ntation								
						(e.g. gift								

	Process	Process_Sub Level 1	Process_ Sub Level 2		Descrip	Questio Catego Categori Is		Existenc Data D				Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function				Basis of Processing		ns/futu ries of es of sensi re Individ Personal e	tiv work to identify third parties]	e of Protecti P Automa on n			security measure (if possible)	s Schedule Condition for Processing	Processing	
		Processing donations and pledges	Process direct debit donations internally or via 3rd party	Contract	Ensure	Alumni Name;	If not DARS then via third party such as			7				delete
t & Alumni					donatio	, contact	Rapid Data who receive data, manage							
	Philanthropic Revenue				ns are process	Donors details; , donation	direct debits and notify us of receipt, cancellation, etc.							
	Revenue				ed as	Suppor amount;	For GLAM maybe Galaxy							
					expecte	ters purpose;	Gateway/Microsoft Dynamics (TBD)							
					d by	require								
					donor,	ments								
					at time intende	around acknowl								
					d and	edgeme								
					correct	nt/anon								
					process	ymity;								
					es followe	financial informat								
					d.	ion								
						required								
						to								
						process								
						gift [e.g. credit								
						card;								
						debit								
						card;								
						bank account								
						details];								
						relevant								
						addition								
						al docume								
						ntation								
						(e.g. gift								
	Accept and Process	Processing donations and pledges	Process donations vis Bank Transfer (direct into Bank Account)	Contract		Alumni Name; , contact				7				delete
	Philanthropic		Accounty			Donors details;								
	Revenue					, donation								
						Suppor amount;								
						ters purpose;								
						require ments								
						around								
						acknowl								
						edgeme								
						nt/anon ymity;								
						financial								
						informat								
						ion								
						to required								
						process								
						gift [e.g.								
						credit								
						card;								
						debit card;								
						bank								
						account								
						details];								
						relevant addition								
						addition								
						docume								
						ntation								
						e.g. gift								

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful Basis of		Questio Catego Categori ns/futu ries of es of	Categories of Recipients [NB: More sensitiv work to identify third parties]	Source Loca Existen	Data Data Protecti Protect	Names Safegua	a Retention Appli	licable Irity measures	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
				Processing	Legitim	re Individ Personal	e	data, if of Autom	on n Impa	t countri excepti	io possible) (if po	ossible)			
			Process donations received via 3rd Party giving vehicles e.g.	. Contract		Alumni Name;					7				delete
	Process		Just Giving, Virgin Money, CAF (Charities Aid Foundation),			, contact									
	Philanthropic Revenue		FDF (Foundation de France), Charities Trust, Smart Giving, Stewardship.			Donors details; , donation									
	Revenue		Stewardship.			Suppor amount;									
						ters purpose;									
						require									
						ments									
						around									
						acknowl									
						edgeme nt/anon									
						ymity;									
						financial									
						informat									
						ion									
						required									
						to									
						process gift [e.g.									
						credit									
						card;									
						debit									
						card;									
						bank									
						account									
						details]; relevant									
						addition									
						al									
						docume									
						ntation									
Developmen	Accept and	Processing donations and pledges	Process donations via CAF Vouchers	Contract	+	(e.g. gift Alumni Name;					7				delete
						, contact									
Relations	Philanthropic					Donors details;									
	Revenue					, donation									
						Suppor amount; ters purpose;									
						ters purpose; require									
						ments									
						around									
						acknowl									
						edgeme									
						nt/anon									
						ymity; financial									
						informat									
						ion									
						required									
						to									
						process									
						gift [e.g. credit									
						card;									
						card; debit									
						card; debit card;									
						card; debit card; bank									
						card; debit card; bank account									
						card; debit card; bank account details];									
						card; debit card; bank account details]; relevant									
						card; debit card; bank account details];									
						card; debit card; bank account details]; relevant addition al									
						card; debit card; bank account details]; relevant									

	Process	Process_Sub Level 1	Process_ Sub Level 2		Questio Catego Categori	Is Categories of Recipients [NB: More sensitiv work to identify third parties]	Source Loca Existen	Data Data	a Names Sat	fegua Retention	Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function				Processing	re Individ Personal		data, if of Automa				(if possible)	Schedule Condition for Processing	Processing	
		Processing donations and pledges	Process donations via UOCOL (University of Oxford China	Contract	Alumni Name;					7				delete
t & Alumni Relations	Accept and Process Philanthropic Revenue	Processing donations and predges	Ltd)		, contact Donors details; , donation Suppor amount; ters purpose; require ments around acknowl edgeme nt/anon ymity; financial informat ion required to process g gift [e.g. credit card; debit card; debit bank account details]; relevant addition al									
t & Alumni Relations		Processing donations and pledges	Process gifts made via Text. NB: doesn't appear to be happening currently but have received queries.	Contract	docume ntation (e.g. gift Donors details; , donation Suppor amount; ters purpose; require ments around acknowl edgeme nt/anon ymity; financial informat ion required to process ggift [e.g. credit card; debit card; debit card; bank account details]; relevant addition al docume ntation (e.g. gift					7				delete

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2		Questio Catego Categori I ns/futu ries of es of s	Categories of Recipients [NB: More ensitiv work to identify third parties]	Source Loca Existen	Data Data	Names Sa	fegua Retention	Applicable	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
ancion				Processing	re Individ Personal e	work to identify till parties]	data, if of Automa					Schedule condition for Flotessing		
Developmen		Processing donations and pledges	Process gifts of Shares	Contract	Alumni Name;					7				delete
t & Alumni Relations		Processing donations and pledges	Process gifts of Shares	Contract	Alumi Name; Alumi Name; , contact Donors details; donation Suppor amount; ters require ments around acknowl edgeme nt/anon ymity; financial informat ion required to process gift [e.g. credit card; debit card; bank					7				delete
t & Alumni Relations		Processing donations and pledges	Process information relating to pledges and pledge payments	Contract	Alumni Addition ali account details]; relevant addition al docume ntation (e.g. gift Alumni Name; , contact Donors details; , donation Suppor amount; ters purpose; require ments around acknowl edgeme nt/anon ymity; financial informat ion					Where are deeds of gift stored? Internal System . 7				delete
					required to process gift [e.g. credit card; debit card; bank account details]; relevant addition al docume ntation (e.g. gift									

Business F Function	rocess	Process_Sub Level 1	Process_ Sub Level 2	Lawful Basis of		Questio Cate ns/futu ries	go Categori Is	Categories of Recipients [NB: More nsitiv work to identify third parties]						Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
unction				Processing			vid Personal e	work to identify third parties	data, if of Auton	na on n Impa	t countri exce	entio possible)	(if possible)	schedule condition for Processing	Processing	
Developmen A	ccept and	Processing donations and pledges	Processing cheque via mail or in person with (or without	Contract	To	Alun	nni Name;				Countil CALE	7				delete
	rocess		giving form)		ensure	,	contact									
	hilanthropic				donatio	Don	ors details;									
F	levenue				ns are	,	donation									
					process	Supp	oor amount;									
					ed and	ters										
					acknowl		require									
					edged		ments									
					in a		around									
					timely manner		acknowl edgeme									
					and		nt/anon									
					used for		ymity;									
					the		financial									
					purpose		informat									
					s for		ion									
					which		required									
					they		to									
					were		process									
					given		gift [e.g.									
					and to		credit									
					maintai		card; debit									
					require		card;									
					d		bank									
					financial		account									
					records.		details];									
							relevant									
							addition									
							al									
							docume									
							ntation									
)evelonmen //	ccent and	Processing donations and pledges	Processing gifts in kind (e.g. Donation of art work, book	Contract	To	Policy Alun	(e.g. gift					7				delete
	rocess	rocessing donations and picages	collection, supply of goods/services)	Contract	ensure		contact					ľ				
	hilanthropic				donatio		ors details;									
	levenue				ns are		donation									
						kind are Supp	oor amount;									
						recorde ters	purpose;									
					acknowl	d	require									
						(probab	ments									
					in a	ly DARS	around									
						specific)	acknowl									
					manner and		edgeme nt/anon									
					used for		ymity;									
					the		financial									
					purpose		informat									
					s for		ion									
					which		required									
					they		to									
					were		process									
					given		gift [e.g.									
					and to		credit									
					maintai		card;									
					n		debit card;									
					require		card; bank									
					financial		account									
					financial records.		details];									
					lecorus.		relevant									
							reievant									
							addition									
							addition									
							al									
							addition al docume ntation									

	Process	Process_Sub Level 1	Process_ Sub Level 2				tego Categori						Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
inction				Basis of Processing			es of es of divid Personal	sensitiv work to identify third parties]						s Schedule Condition for Processing	Processing	
evelopmen A	Accept and	Processing donations and pledges	Processing of cash gifts made at events	Contract	To	re Ir It A	umni Name;		data, it ot Au	toma on n Im	ipact countri ex	7	(IT possible)			delete
& Alumni P					ensure		contact									
	Philanthropic						onors details;									
R	Revenue				ns are		donation									
							ppor amount;									
					acknowl	ng that te	rs purpose; require									
					edged	s often -	ments									
						need to	around									
					timely		acknowl									
					manner		edgeme									
					and used for	process	nt/anon ymity;									
						this so	financial									
					purpose		informat									
					s for	know	ion									
					which		required									
						deal	to									
						with it if	process									
					given and to	occurs.	gift [e.g. credit									
					maintai		card;									
					n		debit									
					require		card;									
					d		bank									
					financial records.		account details];									
					records.		relevant									
							addition									
							al									
							docume									
							ntation									
evelopmen A	Accept and	Processing donations and pledges	Processing of donations made via Donation Boxes.	Contract	То	Work A	(e.g. gift umni Name;					7				delete
& Alumni P	Process				ensure		contact									
	Philanthropic						onors details;									
R	Revenue				ns are process	GLAM/ ,	donation									
						Registry te	ippor amount; rs purpose;									
					acknowl		require									
					edged		ments									
					in a		around									
					timely		acknowl									
					manner and		edgeme nt/anon									
					used for		ymity;									
					the		financial									
					purpose		informat									
					s for		ion									
					which		required									
					they were		to process									
					given		gift [e.g.									
					and to		credit									
					maintai		card;									
					n		debit card;									
					require											
					financial											
					records.											
							relevant									
							addition									
							al									
							docume ntation									
					d financial records.		addition al docume									

	Process	Process_Sub Level 1	Process_ Sub Level 2			Questio Catego Categori I							Retention /	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function							ensitiv work to identify third parties]							Schedule Condition for Processing	Processing	
Function Developmen			Process_ Sub Level 2 Processing of legacy payments	Basis of Processing Contract	tion of Legitim	ns/futu ries of es of s re Individ Personal e Legato Contact r; details Execut (of or; Executor Solicito /Solicitor r); copies of wills, sections of wills, relevant correspo ndence and docume nts. Progress until payment received	categories of Recipients [NB: More ensitiv work to identify third parties]	of the	tion e of	Protectio	of third rd	ds for s xceptio p V fi w d s ¹ h Ir Ir	chedule (if s	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
	Accept and Process Philanthropic Revenue	Thanking donors		Contract	An appropr iate thank you is sent to donors to acknowl edge their gift (unless	Donors details; , donation Suppor amount; ters, purpose; Legato require rs ments around acknowl edgeme nt/anon ymity;						ir	n perpetuity			
Developmen	Manage	Event Administration _pre-event	Development of programme of activities including times,	Legitimate	they specific ally request no acknowl edgeme nt).	to process						ir	n perpetuity			
	Manage Programme of Events		Development of programme of activities including times, dates, definition of audience, themes	Legitimate Interest	Ensure high quality/ variety	; relevant						ir	n perpetuity			

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2			Categories of Recipients [NB: More tiv work to identify third parties]	Source Loca Existenc Data Data of the tion e of Protecti Protecti data, if of Automa on n	ta Names Safegua Retention A ptectio of third rds for schedule (if s mpact countri exceptio possible) (i	pplicable S ecurity measures S f possible)	ipecial Category Data - Data Protection Bill ichedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
Development	n Manage Programme of Events	Event Administration_ pre-event	Accept and process donations along with event booking (se accept and process philanthropic revenue)	e Contract	Ensure Alumni See able to ; above donatio ; processi ns if Suppor ng attende ters; donation es wish Studen s. to ts; donate. Parent s; Guests (who may include childre n - no records create d for childre n - name and possibl y ages record ed)							delete
Developmen t & Alumni Relations	n Manage Programme of Events		Find relevant contributors/speakers at events from records of previous speakers and personal data held. May include research of data in the public domain.	Interest	the ; relevant highest Donors data			in perpetuity				
Relations	Programme of Events		Receive and process payment for events (see processing commercial revenue - above)	Contract	possible : held Alumni See above Donors for processi Suppor ng ters; commer Studen cial ts; revenue. Parent S; Guests (who may include childre n - no records create d for childre n - name and possibl y ages record ed)							delete
Developmer t & Alumni Relations	n Manage Programme of Events	Event Administration_ pre-event	Receive and record registrations, receive and respond to queries relating to event	Contract	Alumni Name; , names Donors of guests ; (incl. any Suppor children) ters; ; contact Studen details; ts; payment Parent details s; including Guests informat (who ion may required include to childre process n - no payment records (e.g. create credit d for card, childre debit			in perpetuity				

D	D	Description Calculation	Designed Carls Land 2	Laure Cal	D	tio Catego Categori Is Categories of Recipients [NB: M					A surel's a la la	Consider Contraction Data Data Desta Dill	Constitution of the complete full parts for	Determine and Freedom Dellar
	Process	Process_Sub Level 1	Process_ Sub Level 2		tion of no/fu	tio Catego Categori Is Categories of Recipients [NB: M itu ries of es of sensitiv work to identify third parties]	of the tion	e of Protecti Pr	ata Names Sa	fegua Retention	Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function				Basis of			or the tion	e or protecti pr		s for schedule (if		Schedule Condition for Processing	Processing	
Development		Front Administration and south	Calastian of annual actions and		Legitim re	Individ Personal e	data, if of	Automa on n	Impact countri ex		(if possible)			
Developmen	Manage	Event Administration_ pre-event	Selection of venue, caterers, etc.	Legitimate		Alumni Business				in perpetuity	/			
	Programme of	t		Interest	and	; related								
Relations	Events				effectiv	Donors data for								
					e	; vendors.								
					manage	Suppor May								
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Developmen	Manage	Event Administration_onsite	Check attendees and their guests into events (incl. onsite	Contract	Record	Alumni Name;				in perpetuity	/			
t & Alumni	Programme of	f	online check-in and payment)		who is	; names								
	Events					, Indines								
					at	Donors of guests								
					at venue/	Donors of guests ; (incl. any								
					at venue/ who has	Donors of guests ; (incl. any Suppor children)								
					at venue/	Donors of guests ; (incl. any Suppor children) ters; ; contact								
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					at venue/ who has	Donorsof guests;(incl. anySupporchildren)ters;; contactStudendetails;ts;payment								
					at venue/ who has	Donors of guests ; (incl. any Suppor children) ters; ; contact Studen details;								
					at venue/ who has	Donorsof guests;(incl. anySupporchildren)ters;; contactStudendetails;ts;payment								
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Business	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful	Descrin Ou	estio Catego Categori Is Categories of Recipients [NB: More	Source Loca Existenc Data	Data Name	es Safegua	Retention A	nnlicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Frasure Policy
Function				Basis of	tion of ns	futu ries of es of sensitiv work to identify third parties]	of the tion e of Protec	<mark>ti Protectio</mark> of thi	ird rds for	schedule (if se	ecurity measures	Schedule Condition for Processing	Processing	
Developmen	Managa	Event Administration ansite	Film take shate south a same or athen vice does we get a such	Processing	Legitim re	Individ Personal e	data, if of Automa on	n Impact count			if possible)			
Developmen		Event Administration_onsite	Film, take photographs, record or otherwise document event			Alumni name,				in perpetuity				
	Programme		(e.g. twitter feed), could also include being captured by CCTV	Interest	a record	; records								
lelations	Events		during course of event.		of event	Donors of								
					as part of	; attendan								
						Suppor ce;								
					social/c	ters; photogr								
					ultural	Studen aphs								
					history	ts; (incl.								
						Parent captions								
					college,	s;) and								
					dept.	Guests video/au								
					Enable sharing	(who dio may recordin								
					of event	include gs of								
					content	childre events								
					/experi	n - no which								
					ence	records may be								
					with	create publishe								
					those	d for d after								
					who are	childre event;								
					unable	n -								
					to	name								
					attend	and								
					in	possibl								
					person.	y ages								
					person	record								
						ed)								
()														
Developmen t & Alumni		Event Administration_onsite	Provide guest lists, display seating plans and provide name	Legitimate						in perpetuity				
			badges. May include guest list published in advance online.	Interest		proac ; perhaps								
Relations	Events				network h									
/				1										
						urin ; compan								
					helps g h	ave Suppor y (if								
					helps g h attende cor	ave Suppor y (if isent ters; networki								
					helps g h attende cor es for	ave Suppor y (if Isent ters; networki Studen ng								
					helps g h attende cor es for identify gu	ave Suppor y (if Isent ters; networki Studen ng Ist ts; event).								
					helps g h attende cor es for identify gue where list	ave Suppor y (if sent ters; networki Studen ng st ts; event). 5, Parent Might								
					helps g h attende cor es for identify gu where list to find etc	ave Suppor y (if sent ters; networki Studen ng event). s, Parent Might s; include								
					helps g h attende cou es for identify gu where list to find etc their	ave Suppor y (if Iters; networki Studen ng Iters; event). S, Parent Might S; include Guests more								
					helps g h attende cor es for identify gur where list to find etc their friends;	ave Suppor y (if sent ters; networki Studen ng event). s, Parent Might S; include Guests more (who with								
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					helps g h attende con es for identify guu where list to find etc their friends; Ensure smooth-	ave Suppor y (if stent ters; networki Studen ng st ts; event). s, Parent Might . s; include Guests more (who with may consent include (e.g.								
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					helps g h attende cor es for identify gu where list to find et their friends; Ensure smooth- running of event - people know where to sit,	ave Suppor y (if ters; networki studen ng guests more (who with may consent include (e.g. childre contact n - no details) records childre name								
					helps g h attende cor es for identify gu where list to find et their friends; Ensure smooth- running of event - people know where to sit,	avex Suppor y (if isent isers, networki isent Studen ng stat ise event) stat s; event) s, Parent Might s, Guests more (who with may consent include (e.g., childre contact n - no details) create indir n - n- name and and possibi								
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Business	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful	Descrip	Questio Catego Categori	Is Categories of Recipients [NB: More	Source	Loca Existenc Dat	a Data	Names Safe	egua Retention	Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function				Basis of	tion of	ns/futu ries of es of	sensitiv work to identify third parties]	of the	tion e of Prot	tecti Protectio	of third rds	for schedule (if	security measure	Schedule Condition for Processing	Processing	
Developmen			Import data from 3rd parties (e.g. EventBrite, Cvent) into	Processing Legitimate	Ensure	re Individ Personal Alumni All data	YES	data, if	of Automa on	n Impact	countri exce	in perpetuity	(if possible)			
	Programme of		main database.	Interest	have	; involved										
Relations	Events				accurat e record	Donors in ; organisa										
					of who	Suppor tion -										
					was	ters; not										
					invited, who	Studen credit/d ts; ebit card										
					attende											
					d, any consent	s; Guests										
					for	(who										
					email	may										
					commu nication	include childre										
					or	n - no										
					consent	records										
					to store sensitiv	create d for										
					e	childre										
					persona I data	n - name										
					on	and										
					ongoing											
					basis is provide	y ages record										
					d.	ed)										
Developmen			Post event evaluations	Contract	Evaluat	Alumni Name,				1		Where is data				delete
t & Alumni Relations	Programme of Events				e success	; contact Donors details	Qualtrics					recorded/kep and for how	t			
					and	;						long: in				
					incorpo rate	Suppor ters;						perpetuity. Would it				
					feedbac	Studen						remain in				
					k into	ts;						survey tool? 1	L			
					future event	Parent s;										
					plannin	Guests										
					g.	(who may										
						include										
						childre										
						n - no records										
						create										
						d for childre										
						n -										
						name and										
						possibl										
						y ages										
						record ed)										
Developmen	Manage	Event Administration_post event	Publish photos of event in print materials, newsletters,	Legitimate	Remind	Alumni Name of	YES					in perpetuity				
t & Alumni	Programme of		online, via Flickr	Interest	attende	; attendee										
Relations	Events				es of how	Donors or guest; ; attendan										
			· · · · · · · · · · · · · · · · · · ·													

Ducinos	Duesees	Dresses Cub Lough 1	Dresses Sub Lough 2	Laurful	Deserie	Questio Catego (Categories of Recipients [NB: More	Courses	Loss Evices	Dete	Dete	Namaa	Cafeerie	Detention	Annlinghia	Special Category, Data Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Detention and Freeven Deliev
Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2												Retention		Special Category Data - Data Protection Bill		Retention and Erasure Policy
runction				Basis of	Logitim	ns/futu ries of e re Individ F	5 01 <u>56</u>	ensitiv work to identify third parties]	data if	of Aut	ma on	n Image	countril r	over the	schedule (If	security measures (if possible)	Schedule Condition for Processing	Processing	
Developmen	Manage	Event Administration_post event	Record attendance/non attendance and create any contact	Legitimate	Ensure	This Alumni	ame:		uată, IT	Auto	ma on	nimpact	countri e	exceptió	in perpetuity	(in possible)			
	Programme of		reports as relevant (see relationship management)	Interest	accurat		ecord								in perpetatey				
Relations	Events					include Donors of													
inclutions.						recordin ;													
						g Suppor d													
						inappro ters;													
						priate Studen													
					nt in	behavio ts;													
					terms	ur (not Parent													
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						just fact Guests													
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					ship/en	some) include and childre													
						taking n - no													
						steps to records													
						ensure create													
						that d for													
						certain childre													
						individu n -													
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					of	not and													
						invited possibl													
					of	again. y ages													
					attende	Policy record													
						for "Do ed)													
						not													
					attende														
					e, who														
						decision													
					from where,	" needs review.													
Developmen	Manage	Event Administration_post event	Supply post event materials/follow-up/thanks for attending	Contract/Le	Thank	Alumni	ame; YI	ES							in perpetuity				
	Programme of			gitimate	attende		ontact												
Relations	Events				es for	Donors o													
					investin	;													
					g the	Suppor													
					time to	ters;													
					attend,	Studen													
					ensure	ts;													
					they	Parent													
					have	s; Guests													
					interesti ng	(who													
					material	may													
					s if	include													
					availabl	childre													
					e.	n - no													
					Encoura														
					ge	create													
					further	d for													
					engage	childre													
					ment	n -													
					with	name													
					event	and													
					subject.	possibl													
					legitima	y ages record													
					te	ed)													
					interest	cu,													
					interest rather														
					than														
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					then														
					might														

Business	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful	Descrip	Questio Catego Categor	Is Categories of Recipients [NB: More	Source	Loca Evict	one Data	Data	Names Sa	afogua P	Retention	Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Petention and Frasure Policy
Function	FIDCESS	Process_Sub Level 1	Process_ Sub Level 2			ns/futu ries of es of	sensitiv work to identify third parties]									Schedule Condition for Processing	Processing	Retention and Erasure Policy
i unction				Processing			e work to lucitary time particity		of Auto						(if possible)	Schedule condition for Processing	Toccomp	
Developmen	Manage	Event Administration_pre-event	Collect event registrant and guest details and	Contract	Importa	Alumni Name;	YES Others involved in the event across the				Ininpace	countri c/		n perpetuity				
	Programme of		produce/monitor regularly updated lists of respondents.		nt to	; names	collegiate University, staff who have											
Relations	Events				ensure	Donors of guest												
					best	; (incl. an												
					possible	Suppor children	House, Academics)											
					service	ters; ; contac	3rd Parties - venues, caterers,											
					is	Studen details;	entertainers, speakers											
					offered	ts; paymen												
					making		EventBrite; BBCRM/BBIS;											
					reasona													
					ble	Guests informa												
					adjustm		Email tools: e.g. mailchimp											
					ents	may required	Survey tools: e.g. Survey Monkey											
					wherev	include to childre process												
					possible													
					in	records (e.g.												
					respons	1 1 1												
					e to any													
					specific													
					require													
					ments	name cheque)												
					attende													
					es have.													
					Also to	y ages specific												
					create	record dietary												
					best	ed) or												
					possible	access/												
					seating	mobility												
					plan to	require												
					facilitat													
					e most	informa												
~ '				<u> </u>	eniovab	ion on												
Developmen	-	Event Promotion	Identify relevant audience/invitees from database or by staf			1 1 1	YES						lin	n perpetuity				
t & Alumni Relations	Programme of Events		recommendation depending on nature of event (segmentation)	Interest	events are	; relevant Donors data												
Relations	LVents		(segmentation)		promot	; held												
					ed only	Suppor may be												
					to	ters; used												
					people	Studen												
					who	ts:												
					might	Parent												
					have a	s;												
					genuine	Guests												
					interest,	(who												
					have	may												
					attende													
					d	childre												
					previou													
					sly, are													
					located													
					in the	d for												
					area,	childre												
					i.e. the	n -												
					right	name												
					people	and possibl												
					are invited	y ages												
					to the	record												
					most	ed)												
					appropr													
					iate													
					event.													
																	· · · · · · · · · · · · · · · · · · ·	

Business	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful	Descrip Que	stio Catego Cat	gori Is Categories of Recipients [NB: More	Source	oca Existenc D	ata Data	Names S	Safegua Re	etention Ap	nlicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Frasure Policy
Function	FIOCESS	FIOLESS_SUB LEVEL I					f sensitiv work to identify third parties]								Schedule Condition for Processing	Processing	Retention and Llasure Policy
					Legitim re	Individ Per			of Automa o					possible)			
Developmen	Manage	Event Promotion	Promote event to intended audience via multiple channels.	Legitimate		Alumni Nar	ne; YES						perpetuity	,,			
t & Alumni	Programme of		For smaller events or those with limited guest lists (e.g.	Interest	the	; con	act										
	Events		dinners, Boat Race, CCB, VCC) work with colleagues across		right	Donors det	ils										
			collegiate University to ensure invites sent to right people.		people	;											
			Follow-up with reminders.		are	Suppor											
					invited	ters;											
					to the	Studen											
					most	ts;											
					appropr	Parent											
					iate	s:											
					event.	Guests											
					Ensure	(who											
					key	may											
					relation	include											
					ship	childre											
					manage	n - no											
					rs	records											
					across	create											
					Universi	d for											
					ty are	childre											
					aware	n -											
					who will	name											
					be	and											
					attendi	possibl											
					ng	y ages											
					event.	record											
					Remind	ed)											
					1 1	eu)											
					ers ensure												
					that												
					achieve												
					best possible												
Developmen	Manage	Event Promotion	Promote forthcoming events/events listing/bulletin in	Legitimate		Alumni Nar	ie;					in	perpetuity				
	Programme of		multiple channels	Interest	alumni	; con											
	Events				are	Donors det											
					aware	;											
					of	Suppor											
					events,	ters;											
					lectures	Studen											
					, etc.	ts;											
					availabl	Parent											
					e for	s;											
					them to	Guests											
					attend	(who											
					that	may											
					they	include											
					might	childre											
					be	n - no											
					interest	records											
					ed in.	create											
						d for											
						childre											
						n -											
						name											
						and											
						possibl											
						y ages											
						record											
						ed)											
						,											

Business Function	Process	Process_Sub Level 1	Process_Sub Level 2 Lawful Basis c	f tion o	ip Questio Catego Catego f ns/futu ries of es of	<mark>sensitiv</mark>	Categories of Recipients [NB: More work to identify third parties]	of the tion e of	f Protecti P	rotectio of third	Safegua <mark>Retention Ap</mark> rds for schedule (if se	curity measures	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
Developmen	Manage	Review/research employment data to	Proces	ate To	m re Individ Persor Alumni Name;			data, if of Aut	oma on n	Impact countri		possible)			
t & Alumni	Programme of	determine who might be interested in	Interes	t invite	; contac	t									
Relations		speaking at/participating in/attending an event		alumn to con		6									
		event		and	Suppor biogra	ph									
				speak,	/s ters; ical an	d									
				hare expert		e									
				e with											
				studer											
				s or fellow	Guests (who										
				alumn	ii may										
				or (if non-	include childre										
				alumn											
				to con											
				and preser	create nt d for										
				on are											
				of	n -										
				expert e that	and										
				might	possibl										
				be of intere											
				to	ed)										
				group of											
				alumn	i.										
		Promotion of college, department, University		ate Raise			3rd Party Payment Provider: ? What is								
t & Alumni Relations		merchandise - e.g. t-shirts, choir CDs, Christmas Cards, etc.)		t/Co additio or al	on , contac Donors details		used by Continuing Education								
	(,		digital	soft- mone	y , previo	us									
				for e as college	Suppor purcha e/ ters es	as									
				rcial dept./											
)	ni.											
		Promotion of further education courses		ate On	Alumni Name;		3rd Party Payment Provider: WPM (for								
t & Alumni Relations				t/Co behalf or of the			University Shop)								
Relations	(commercial)			soft- Univer		· · · · · · · · · · · · · · · · · · ·									
				ty's	purcha	as									
				e as Contir rcial ng	nui es										
)	Educa	ti										
				on Depar	+										
				ment,											
				promo											
				e availal	bl										
				e											
				course and	25										
				offer											
				10%	10										
				discou t to											
				Alumr	ni										
		Promotion of tailored alumni travel packages		ate Raise			Vendor external to University/Colleges								
t & Alumni	oduct	in order to receive a % of sales	Interes	t/Co additio	on contac										
Relations	(commercial)			or al soft- mone	y details										
			opt-in	for	purcha										
				e as collegercial dept./											
)	ni.											

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful Basis of	tion of	Questio Catego Ca ns/futu ries of es	of <mark>sensit</mark>	Categories of Recipients [NB: More tiv work to identify third parties]	of the tion e of	Protecti Protecti	Names Safegua Retention io of third rds for schedule (if	security measure	Special Category Data - Data Protection Bill s Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
t & Alumni	Marketing_Se rvices (non- commercial)	Promote Careers Service offering to Alumni		Legitimate Interest/Cu nsent for digital	io alumni are aware of the range of services offered by Careers both for themsel ves but also to student s. Also to progra mes availab e that compan ies at which alumni work might be	Alumni cc dd st st ar er m se w w w w v v v v v v v v v v v v v s s s s					t countri exceptio possible)	(if possible)			
t & Alumni	Reporting,	Financial reporting on donations received, areas supported, giving levels, patterns of giving, areas for focus, etc.		Legitimate	ed in e Monitor progres s against goals, evaluat e and make best decision s about how to manage resourc es.	Alumni D , n Donors ar , ; Suppor pr ters s; ar ss dt ot bi ic ic ic dt dt dt dt dt dt dt dt dt dt dt dt dt	nounts	Central finance teams, auditors (external and internal)			7				Delete
t & Alumni		Financial reporting to internal and external governing, regulatory bodies		Legal requireme t	To meet n various legal require ments of regulato ry bodies (e.g. Office of Student s (OfS), UK GAAP, Charity Commis sion SORP, tax return).	, se Donors a: , at Suppor ters	d data	Various official bodies to whom we report (OfS, Charity Commission); committees and governing bodies; management teams;							

Business Function	Process	Process_Sub Level 1	Process_Sub Level 2	Basis of		estio Catego Categori I futu ries of es of Individ Personal	Categories of Recipients [NB: More ensitive work to identify third parties]	of the	tion e of F	rotecti Protec	ctio of third	Safegua Retention rds for schedule (if exceptio possible)		pecial Category Data - GDPR Lawful Basis for rocessing	Retention and Erasure Policy
t & Alumni	Operational Reporting, Management Reporting and Governance	Forecasting of future revenue		Legitimate Interest		Alumi Althoug , h data Donors would , be Suppor anonymi ters sed in many reports, there are cases where it might be necessar y to include data on individu als, for example when reviewin g potential gifts or pledges that are expecte d but have not y et been received						7			Delete
t & Alumni	Operational Reporting, Management Reporting and Governance	Market Research	Collect feedback on Customer Satisfaction	Legitimate Interest	require	Alumni , Donors , Suppor ters						perminant			
t & Alumni		Measurement of ROI of activities		Legitimate Interest	Ensures resourc es are used in the most efficient and effectiv e way.	Alumni , Donors , Suppor ters						7			delete
t & Alumni	Reporting,	Provide data HESA Graduate Outcomes Survey (contact data provided to ensure inclusion in/response to this piece of research)		Legitimate Interest		Alumni Name; , contact Donors details , Suppor ters	HESA					perminant			

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2	Basis of	tion of	Questio Catego (ns/futu ries of e	es of sei	Categories of Recipients [NB: More nsitiv work to identify third parties]	of the tion e of	Protecti P	rotectio of third	Safegua Retention	security measures	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
Function Developmen	Operational	Respond to, record and monitor complaints			tion of Legitim	ns/futu ries of o re Individ I Alumni I Donors o , r Suppor o ters o t	es of ser Personal e Name; contact letails; ecord		of the tion e of	Protecti P	rotectio of third					delete
	Management/	1:1/Personal communications, e.g. at meetings, events, via personal phone calls, individual email or print correspondence		Legitimate Interest	offered.	, Donors , Suppor ters						perminant				
t & Alumni	Relationship Management/ Engagement_ ALL	Administrative communications by phone, print, fax email.		Contract	?Contra ct - around donatio n, event attenda nce, registra tion for online services , checkin g if have underst ood request correctl y, etc.	, Donors , Suppor ters						perminant				

Business	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful	Descrip	Questio Catego	atogori le	Categories of Recipients [NB: More	Course	Loca Existens	Data Dat	Nor	noc Cofogi	ua Retention	Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Potentian and Fracuro Bolicy
Function	FIDLESS	FIOLESS_SUB LEVEL1				ns/futu ries of		ensitiv work to identify third parties]	of the	tion e of	Protecti Pro	tectio of th	hird rds for	r schedule (if	security measures	Schedule Condition for Processing	Processing	Retention and Erasure Policy
			1	Processing	Legitim	re Individ f			data, if	of Automa	on n In	mpact cour	ntri excep	tio possible)	(if possible)	-	-	
		Assist with administration of/support "friends" groups (e.g. Friends of Continuing Education,		Legitimate Interest	Facilitat	Alumni								perminant				
		college Friends groups)	I		e groups	, Donors												
Relations	ALL	concer menus groupsy			that	,												
					strengt	Suppor												
					hen	ters												
					relation													
					ships													
					betwee													
					alumni/													
					support													
					ers and													
					specific causes													
					or													
					organis													
					ations													
					across the													
					collegiat													
					e													
					Universi													
					ty.													
		Classify constituents into groups based on the		Legitimate		Alumni /		3rd Party Consultants to assist with						perminant				
t & Alumni Relations		data we hold on them - major donor, alumni, friend, lifetime value. Do this via automated or			better segmen	, r Donors d	elevant lata	analysis - typically would share only anonymised data (incl. ID)										
Relations		manual analysis or mixture of both. Includes			t		vailable											
		creating audience segments for			audienc	Suppor .												
		communications. PROFILING, SEGMENTATION.			es and	ters												
					underst and													
					what													
					messag													
					es we													
					should													
					be sending													
					to													
					which													
					audienc													
					es at what													
					time -													
					engagin													
					g them													
					in the most													
					appropr													
					iate and													
					relevant													
					way. Ensure													
					our													
					commu													
					nication													
Developmen	Relationship	Collect and record preferences about how		Legitimate	s (news, Commu	Alumni								perminant				
t & Alumni	Management/	alumni, donors and supporters would like to	1	Interest	nicate	,												
Relations		be communicated with and in what channel	(Consent as	with	Donors												
	ALL	(may include preferred addresses)	I I I I I I I I I I I I I I I I I I I	required for digital	r audienc es in													
					es in the	Suppor ters												
					most													
					appropr													
					iate way													
					and wherev													
					er													
					possible													
					,													
					accordi													
					ng to their													
					known													
					prefere													
					nces.													

Business Function	Process	Process_Sub Level 1	_	Basis of		u ries of es	of <mark>sensi</mark>	Categories of Recipients [NB: More it work to identify third parties]	of the tio	a Existenc Data Data a e of Protecti Prot	ectio of third rds	for schedule (if	security measures	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
		Collect information about willingness/offers of		Processing Legitimate	Provide	Individ Pe Alumni	rsonal e		data, if of	Automa on n Im	pact countri exc	eptio possible) perminant	(if possible)			
		volunteering and area of volunteering, e.g.			s advice	, Donors										
	ALL	hosting of students, membership of advisory boards or development boards, provision of			and directio	Donors ,										
		expertise or advice,			n for	Suppor										
					Develop ment	ters										
					and											
					Alumni Relation											
					s											
					activitie s.											
					Provide											
					s importa											
					nt											
					contacts for											
				1	fundrais											
					ing; Provide											
					s											
					opportu nities											
					for											
				1	current student											
					s and											
					young alumni											
					as well											
Developmen	Relationship	Collect updates to personal data and gather		Legitimate	as for Helps These	Alumni Na	me;	Email tools				perminant				
		additional information from individuals either			ensure forms		ntact	3rd Parties e.g. Buffalo for online								
	ALL	via print or online forms or registration on Oxford Alumni Online or other online platform			accurac may y and also as	Donors de k , bio	graph	versions BBCRM/BBIS								
		"Personal Information Forms" (forms always		digital	currenc for	Suppor ica	l info									
		clear that providing data to keep in touch)			y of the inform data tion		listed ove);									
					held, that		ecific estion									
					usually might involves be		round									
					confirm publish		nions									
					ation of ed in consent the	/in s	terest									
					to email college											
					(and newsle prefere ter or											
					nces for online											
					other as well types of as bein											
					commu record nication d in the											
					s). This databa											
					can also e. Thes help might											
					reduce include											
					cost of life returne events											
					d mail. such as	s										
					Provide births, s a marria											
					vehicle es and											
					where deaths we can need to											
		Coordinate and record visits to Oxford		Legitimate		Alumni						perminant				
t & Alumni Relations	Management Engagement			Interest		, Donors										
	ALL					,										
						Suppor ters										

	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful	Descrip	Questio Catego	Categori Is	Categories of Recipients [NB: More	Source Loca Existenc Dat	a Data Names Sa	fegua Retention Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function				Processing	g Legitim	ns/futu ries of re Individ	Personal e	nsitiv work to identify third parties]	of the tion e of Pro data, if of Automa on			res Schedule Condition for Processing	Processing	
		Facilitate the sharing data between alumni e.g.		Consent	Facilitat	Consent Alumn given ,					perminant			
	Management/ Engagement_	via directories			es network	or Donors								
	ALL				ing/enc	names/i								
					ourages	nfo to Suppor								
						appear. ters								
					to particip	Need								
					ate in	overall								
					college	strategy								
					as well									
					as peer network									
					s - in									
					depts.									
					Such as SBS,	similar services								
					facilitat	offered								
						Gradu								
					network	way,								
					ing in busines	Jxford Alumni								
					s areas	Online,								
					relevant	other)								
					across									
					many professi									
					ons.									
Devile	Deletionship			1 141 4 -	Calification	A								
		Information about social media presence - influence, etc., twitter account, Facebook,		Legitimate Interest	e So that we	Alumn					perminant			
Relations	Engagement_	linked in. Might also record areas of interest		interest	know	, Donors								
	ALL	demonstrated.			which	,								
					of our	Suppor								
					alumni have	ters								
					reach/in									
					fluence -									
					could help in									
					promoti									
					ng an									
					event or									
					a cause.									
Development	Deletiershire			u Lee't'uuu	To									
	Relationship Management/		Make proactive efforts to keep in touch with alumni if the have moved address - may involve looking for new address			Alumn					perminant			
	Engagement_		asking peers if they have address, will forward on	s, merese	links are	, Donors								
	ALL		information ,etc.		maintai	,								
					ned with as	Suppor								
					many	ters								
					alumni									
					as									
					possible and that									
					as many									
					alumni									
					as possible									
					are									
					invited									
					to									
					relevant events -									
					especial									
					ly									
					gaudies									
					and reunion									
					s.									

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2		tion of 1		sensitiv wo	tegories of Recipients [NB rk to identify third partie	es] <mark>o</mark>	of the tio	a Existenc Data e of Prote Automa on	cti Protectio	of third rd	s for sche	edule (if s		Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
t & Alumni Relations		Manage memberships (e.g. of societies, friends groups, interest groups, giving circles, etc.)		Legitimate		Alumni Donors Suppor ters									rminant	ii possibie)			
t & Alumni Relations	Relationship Management/ Engagement_ ALL	Manage volunteers	Make payment for reimbursement of expenses - volunteers	Contract		Alumni , Donors , Suppor ters	Inte	ernal finance systems						7					delete
t & Alumni Relations		Manage volunteers		Legitimate Interest		Alumni , Donors , Suppor ters								perr	minant				
t & Alumni Relations	Management/ Engagement_ ALL		Collect feedback and opinions from our audiences	(consent not required even for email on true market research)	s insight into the experie nces of our audienc t s es and helps inform and/or improve the services we provide to them. Surveys where to them. Surveys where to them. Surveys where to anonym ised data returne d as recomm endatio ns (would	Alumni , Donors , Suppor ters		l party research orgs. e.g. :tMAP, Moore Partnership Idy,							minant				
t & Alumni Relations			Customer experience/usability research (would record that taken part)	Interest	Improve custom er journey, especial ly online. Ensure forms are perform ing as require d - conversi on, etc.	Alumni , Donors , Suppor ters								perr	minant				

Business Function	Process	Process_Sub Level 1			tion of	ns/futu ri	atego Categor es of es of ndivid Persona	sensitiv	Categories of Recipients [NB: More work to identify third parties]	of the	Loca Existenc Data tion e of Prote of Automa on	cti Protectio	of third re	ds for s	schedule (if	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
t & Alumni Relations	Relationship Management/ Engagement_ ALL	Market Research	Focus groups (may record that someone had taken part)	Legitimate Interest		Α , , , , , , , , , , , , , , , , , , ,	lumni ionors uppor ers		3rd Party consultants organising focus groups, collating responses and writing up reports.						perminant			
t & Alumni Relations	Management/ Engagement_ ALL	events, volunteering, benefits (including careers service)		Interest Consent as required for digital comms.	ng vevents, fundrais ing, telling contacts of impact of donatio n, volunte er newslet ter, careers newslet ter, Share news, promot e events, fundrais ing projects , volunte ering opportu	e , around D digital , specific te ally email.	ionors uppor ers		Mailing houses, printers, Facebook, email tools						perminant			
t & Alumni Relations	Management/ Engagement_ ALL			Legitimate Interest		Guidanc A e , around D digital , comms. Si	onors								perminant			
t & Alumni Relations	Relationship Management/ Engagement_ ALL	Online presence/services	Social/Professional Networking Platforms - "Linked-in" for Oxford/Colleges Platform for Alumni, share information, find mentoring/work experience, connecting with fellow alumni for advice, networking; also communicate with one-another.	Interest		, D , Si	lumni ionors uppor ers		Graduway; Illuminati and others (they collect and process the data and then provide some back to us)					F	perminant			

ocess_ Sub Leve	Process Su	Sub Level 2	Lawful [Descrip Ou	uestio Catego Categor	ri <mark>Is</mark>	Categories of Recipients [NB: More	Source Loca	Existenc Data Data	Names Safeg	Retention	Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
			Basis of t	tion of ns	s/futu ries of es of	sensitiv 🛛	work to identify third parties]	of the tion	e of Protecti Protec	tio of third rds fo	or schedule (if	security measures	Schedule Condition for Processing	Processing	······,
			Processing L Legitimate E	Legitim re Build a	Individ Persona Alumni Informa	al <mark>e</mark>		data, if of	Automa on n Impa	act countri excep	ptio possible) perminant	(if possible)			
	nors or			history	, ion						perminant				
	ct or			of our	Donors around										
				relation ship	, the Suppor solicitati										
				with our	ters on of										
				alumni -	gifts										
				with	(related										
				college, depart	visits, meeting	,									
			r	ment	s,	2									
				and	reports,										
				central Universi	correspo										
				ty;	as part										
			E	Ensure	of										
				right ask	fundrais	si									
				made of	ng relation	s									
			r	right	hip)										
				individu al at											
				right											
			t	time for											
				right											
				project. Ensure											
			c	donors											
				receive											
			r	meanin gful											
			s	steward											
	 I		Legitimate E	ship/co	Alumni			_			perminant				
	who			best	,						perminant				
	ext of			possible	Donors										
	a gift			experie nce for	, Suppor										
				donor/p	ters										
				rospect											
				at meeting											
				s. Able											
				to hone											
				in on subjects											
				of											
				importa											
				nce and interest											
				to busy											
				alum											
				quickly, underst											
				and											
				what is											
				importa nt to											
				them,											
				what											
				motivat es											
				them,											
				where											
				their interest											
	t alumni,		Legitimate U	Used to	Alumni • name,	·					perminant				
	the			ensure invited	, title, Donors contact										
				back to	, details,										
			r	right	Suppor date of										
				Gaudy/ Subject	ters birth, gender,										
				reunion.	marital										
			ļ.	Also as	status,										
				an	spouse,										
				area of	family										
			i	interest	details										
				for											
				comms, promoti	or past										
			, ,	on of	students	s									
				public	: studen	it									
			e	events											
			i c a i f c c c c c c	indicati on of area of interest for comms, promoti on of	partner and family details • for current or past students	s									

Business	Process	Process_Sub Level 1	Process_ Sub Level 2 Lawfi	ful Descri	p Questio Catego	Categori Is	Categories of Recipients [NB: More work to identify third parties]	Source	Loca Existen	C Data [Data Na	lames Safe	egua Retention	Applicable	Special Category Data - Data Protection Bill		Retention and Erasure Policy
Function			Basis Proce	essing Legitir	n re Individ	Personal e	work to identify third parties	data, if	of Automa	on r	Impact co	ountri exc	eptio possible)	security measures (if possible)	Schedule Condition for Processing	Processing	
	Management/	Record communications/correspondence from and to constituents, including upload of correspondence to databases.	Legiti Intere	imate rest	Alumni , Donors , Suppor ters								perminant				
Developmer t & Alumni Relations	Management/ Engagement_ ALL	Record details of our ongoing relationship with / alumni, donors and supporters, and how they engage with us: events attended, visits to college, depts., marketing communications received, fundraising activities in which included (e.g. telethon, fundraising appeal mailing)	Legiti Intere	imate Relatic rest Ship Manag ment, Custor er Servicion releva cy of comm nicatic s. Under and overal relatio ship of an indivic al, corpor tion on trust with collegi e Univer	ge , Donors n Suppor ters , n u ters , n st st u u u u u u u u u u u u u u u u u								perminant				
Developmer t & Alumni Relations		Record news updates about what ' alumni/supporters are doing	Legiti Interd	we are inform d whe have iimate	e Ie								perminant				
	Relationship Management/ Engagement_ ALL	Record volunteer work/activity	Legiti Interd	imate rest	Alumni , Donors , Suppor ters								perminant				
t & Alumni Relations	Management/ Engagement_ ALL		Intere		Alumni , Donors , Suppor ters								perminant				
Developmer t & Alumni Relations		Run against MPS to ensure ok to send marketing communications	Legiti	imate est	This is Alumni not , standar Donors d , practice Suppor . ters Fundrai sing Regulat or says must "consid er" doing this.								perminant				

	rocess_Sub Level 1	Process_ Sub Level 2 Lawful		p Questio Catego Catego		Source Loca Existenc Da	<mark>ita Data </mark> Names S	Safegua Retention Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function		Basis of Processi	tion of ng Legitim	ns/futu ries of es of nre Individ Person	sensitiv work to identify third parties]	of the tion e of Pr data, if of Automa or	otecti Protectio of third ru n Impact countri e	rds for schedule (if security mea exceptio possible) (if possible)	sures Schedule Condition for Processing	Processing	
	hare data across collegiate University to nsure have most up to date details		ite Should	Alumni Type of data: Donors deceas , d Suppor update but also o other data but also o other data such as donor info, clearan e e process means additio al data sis shared. t Also c VIII s a but also donor info, clearan additio al data sis shared. t Also e vent s s a bared. S s s s s a bared. S s	College Development and Alumni Relations officers.		n impact countri e	excepto possible) (if possible) perminant			
t & Alumni Management/ h Relations Engagement_ C	ource information about alumni from data eld to promote the benefits of education at xford, at an Oxford college to prospective tudents.	Legitima Interest	te Having good stories to tell about success of alumni can encour ge prospe tive studen s and demon trate the value o an Oxford educat on.	, Donors , Suppor s ters ia ra ra tt s s							
t & Alumni Management/ b	Inderstand connections and networks etween alumni, supporters and prospective onors (e.g. boards on which they serve)	Legitima	te Can inform events, and als engage ment strateg es for potenti al donors	, Donors ;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;				perminant			
	Ipdate data held following personal onversations or correspondence with dividuals	Legitima Interest	te Improv Quality of Data Held	/ ,				perminant			
	Ipdate data using third party sources e.g. ost office updates/royal mail update	Legitim Interest	te Only use where clear that individi al has given permis: on.	, Suppor u ters				perminant			

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2	Basis of	tion of ns	/futu ries	go Categori of es of	sensitiv v	Categories of Recip work to identify th	of the	tion e of	Protecti Prote	ctio of third rd	s for schedule		Special Category Data - Data Protection Bill res Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
Developmen	Relations	ip Use cookies/web beacons/pixels to track		Legitimate	To Co	ookie Alur	vid Personal	e		dáta, if	or Autom	<mark>a on n Imp</mark>	act countri ex	1	(if possible)			delete
		ent/ behaviour in response to email/other digital		Interest										Î.				
Relations		communications and content.			and rev whethe ne r people for are co engagin op g with on	eview - Don eed , r Supp pokie ters pt-in	oor											
					correctl													
					v. e.g.													
		ip Use publically available data to update		Legitimate	Alumni	Alur	nni							perminar	it 🛛			
t & Alumni Relations		ent/ information about alumni, donors and supporters (e.g. Honours Lists, newly appointed officials such as QCs, career or job information, interests)			expect us to know about achieve ments like this.	, Don , Supj ters	oor											
t & Alumni	Managem	ip Use third party sources as part of process of adding or updating constituent data (e.g. Experian)			This is only used to check address against postcod e when either: enterin g data provide d by an individu al, or when an individu al is enterin g data online - e.g. enter postcod e and then select correct address from drop down.	Alur , Don , Supj ters	ors							perminar				

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2		tion of ns/futu		Categories of Recipients [NB: More work to identify third parties]	Source Loca Existenc Data Data of the tion e of Protecti Protecti	o of third rds for schedule (if	Applicable Special Category Data - Data Protection Bill security measures Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
Developmen	Relationship	Where we become aware of relationships		Processing Legitimate	Legitim re Alumni What	Individ Personal e		data, if of Automa on n Impac	countri exceptio possible)	(if possible)		
		between constituents, record those			expect happen	,			permitter			
Relations		relationships to understand networks (family			us to s when	Donors						
		relationships, tutors, friends, trusts/foundations, corporate, etc.).			know we are some of provide	, Suppor						
						ters						
					others informa							
					are tion useful from							
					to offer another							
					excellen alum -							
					t do we custom check							
					er first							
					service with the							
					(groups alumni of concern							
					of concern people ed							
					or before							
					individu recordir	1						
					als who g data - would what if							
					like to the data							
					sit provide							
					togethe d is r at contact							
					events, data							
					etc.). and we							
					didn't previou							
					sly have							
					relation							
Developmen	Relationship	Collect information for College Record (incl.		Legitimate	Ongoing Does	Alumni			perminant			
		relationships not previously recorded)- e.g.		Interest	history process							
Relations		births, deaths, marriages. This will be used in record but also recorded in database.				may also be						
	ALOWINI	record but also recorded in database.			and what	donors						
					relation will)						
					ship happen with to data?							
					with to data? alumni Relates							
					to item							
					above.							
Developmen	Relationship	Establish and work with Alumni Volunteer		Legitimate		Alumni	May involve sharing of minimal		perminant			
t & Alumni	Management/	Boards		Interest		(who	personal data where relevant and with					
Relations	Engagement_ ALUMNI					may also be	agreements in place					
						donors						
Developmen	Relationship	Online presence/services	Oxford Alumni Online - offered by central team and with	Legitimate		Alumni			perminant			
t & Alumni	Management/		specific sites for DARS colleges and departments.	Interest		(who						
Relations	Engagement_		Offer Directory Functionality for Alumni (e.g. Oxford Alumni			may						
	ALUMNI		Network, Graduway	data to be displayed in		also be donors						
				directories)						
Douoloan	Relationship	Provide alumni benefits and services (e.g.		Logitimetr	Net	Alumni Contact	Internal_University					
		JSTOR access, discounts; email forwarding		Legitimate Interest		(who details	Internal_Oniversity		perminant			
Relations	Engagement_				what	may						
	ALUMNI				data is							
					in order	donors)						
					to get							
					access							
					to JSTOR							
					or email	1 1 1						
					forward							
					ing service,							
					or to							
					whom							
					that is provide							
					d.							
				_	L		ļ		<u> </u>			ļ

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2 Law Basi Proc		rip Questio Catego Categori of ns/futu ries of es of im re Individ Personal	sensitiv work to identify third parties]	SourceLocaExistencDataof thetione ofProtectdata, ifofAutomaon	ti Protectio of third r		sures Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
t & Alumni Relations	Management/ Engagement_	Provide support to recognised alumni networks, including helping them get established, advertising their events. volunteers, local alumni groups	Legi	rest Legit	Image Induce Personal Alumni Minimal (who data for may purpose: also be Event - donors may purpose: also be joint supply list of attendee s and info on dietary require ments, etc. Fundrais ing - list of names of people they they could contact if they already have details for them	May involve sharing of minimal personal data where relevant and with agreements in place		n impact countri e	exceptio bossible) (if possible) perminant			
t & Alumni	Management/ Engagement_	Record information of offers of support in the area of careers - e.g. career advice, mentoring, apprenticeships, coaching, networking opportunities, seminars.		timate Ensu rest make appri- iate of valua offer of supp from alum that offer curre stude s anc youn alum profe onal deve ment oppc nities	e (who por may also be donors bble) s) ort) ni ent ent ent s s also be donors) s) s) ent s) ent s) ent ent s s also be donors) s) s) ent s) s) ent s) ent ent s) ent s) ent ent s) ent ent s) ent s) ent ent ent ent s) ent ent ent s) ent s) ent ent s) ent ent ent ent ent ent ent ent ent ent				perminant			
t & Alumni Relations		Record information on use of alumni benefits/services offered		timate Unde rest and how alum are utilis this servi	(who Contact may details also be Careers donors services provided /interact				perminant			

Business	Process	Process_Sub Level 1	Process_ Sub Level 2	awful Des	crip Questio Catego C	tegori <mark>Is</mark>	Categories of Recipients [NB: More	Source Loca Existenc Data	Data Names Safegua	Retention Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function				Basis of tion Processing Leg	of ns/futu ries of e tim re Individ P		w work to identify third parties]	of the tion e of Prote data, if of Automa on	ti Protectio of third rds for	schedule (if security measure possible) (if possible)	Schedule Condition for Processing	Processing	
		Assist with administration/support of 501c3 and other giving vehicles, e.g. AFO, Swiss		egitimate Ensi nterest the	ire Alumni M		Recognised tax efficient giving organisations.			7			delete
Relations		Friends (e.g. promoting their events, ensuring		are			organisations.						
	FUNDRAISING	donations are processed smoothly)		effe		ior to							
				e cha	nnel Suppor d	ing							
				s of	n n	ade							
				givii for		ight ovide							
				terr	tori r	me,							
				es whe		irpose							
				this		nation							
				an imp	orta s	ganisa							
				nt	t	on							
				con ratio		vare to pect							
				whe	n it								
				mal a gi		ost onation							
				maj	or (case							
				or		AFO - me,							
				se.		nation							
				Prov		irpose)							
				iate	/agr E	ent -							
				eed leve		ay pply							
				sup to t	ort li	t of tendee							
				run	ing s	ind							
		Carry out Crowdfunding, Community Fundraising, Peer to Peer campaigns (e.g.		egitimate nterest	Alumni					perminant			
Relations	Engagement_				Donors								
	FUNDRAISING				, Suppor								
					ters								
Developmer t & Alumni		Coordinate relationships with donors across		egitimate nterest	Alumni					perminant			
Relations		collegiate University, especially around approaches for potential gifts.		interest	, Donors								
	FUNDRAISING				, Suppor								
					Suppor ters								
		Manage relationship with a potential major		egitimate	Alumni F	cords Possib	1			perminant			
	Management/ Engagement_	donor from first contact to asking for gift.		nterest	, c Donors ii	le teracti							
	FUNDRAISING				, c	is,							
					Suppor p ters r	ans for ext							
						tivities							
					, ,	oposal							
					s	ovided							
						ovided							
		Manage ongoing individual stewardship of		egitimate	Alumni F	cords Possib	1			perminant			
t & Alumni Relations	Management/ Engagement_	major donor.		nterest	, c Donors ii	e							
	FUNDRAISING				, c	is,							
					Suppor p ters n	ans for ext							
					a	tivities							
						eports ovided							
Developmer	n Relationship	Create web presence for fundraising and	Campaign for Oxford Website - Overarching promotion of	egitimate	Alumni C	okies				1			delete
t & Alumni	Management/	stewardship	Oxford Thinking Campaign - one-stop-shop for searching for	nterest	, v	eb							
Relations	Engagement_ FUNDRAISING		specific areas of giving that are available across collegiate University and ability to give online centrally.		Donors b	acons							
			Offer Directory Functionality for Alumni (e.g. Oxford Alumni		Suppor								
			Network, Graduway		ters								

usiness unction	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful Basis of	tion of	Questio Cates ns/futu ries c	f es of se	Categories of Recipients [NB: More nsitiv work to identify third parties]	of the tion	a Existenc Dat n e of Pro	ecti Protect	tio of third	rds for	schedule (if	security measures	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
				Processing	g Legitim	re Indiv	d Personal e		data, if of	Automa on	n Impa	ict countri	exceptio	possible)	(if possible)			
		Establish and work with Development Advisor	y V	Legitimate		Alum	ni							perminant				
& Alumni	Management	t/ Boards		Interest	upon	,												
elations	Engagement_	_			expertis	Dono	rs											
	UNDRAISING	G			e of													
		-			others	Supp	v											
					(includi	Supp												
						ters												
					ng													
					alumni,													
					donors,													
					support													
					ers) to													
					assist in													
					achieve													
					ment of													
					our													
					goals.													
elonmen	Relationship	Feature donors/alumni stories in our		Consent		Need to Alum	ni							perminant				
Alumni	Management	t/ publications (in print and online)		Consent		ensure ,								permiant				
						I I												
	Engagement						rs											
	FUNDRAISING	6				process ,												
						is in Supp												
						place so ters												
						consent												
						is												
						gained												
						Bamea												
velopmen	Relationship	Legacies_record indication of intention of an		Legitimate	e Enables	Alum	ni							perminant				
		t/ individual to leave a legacy or planned gift and		Interest	college													
		to where in the University/college that legacy		linterest	and	, Dono												
	UNDRAISING	G will be left.			Univers	1 1												
					ty to	Supp												
					gain a	ters												
					level of													
					underst													
					and of													
					number													
					and													
					value of													
					legacy													
					pledges													
					and also													
					to													
					steward													
					the													
					individu													
					individu al													
					individu al plannin													
					individu al plannin g to													
					individu al plannin g to make a													
					individu al plannin g to make a													
					individu al plannin g to make a legacy													
					individu al plannin g to make a legacy													
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					individu al plannin g to make a legacy													
					individu al plannin g to make a legacy													
					individu al plannin g to make a													

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2	Basis of	Descrip Que tion of ns/f	futu ries of e	es of sensit	Categories of Recipients [NB: More work to identify third parties]	of the tior	neof P	rotecti Protectio	of third rds fo	gua <mark>Retention</mark> or <mark>schedule (if</mark>	security measure	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
t & Alumni		Marketing communications by phone (e.g. telethons, telephone fundraising)	Promotional Phone calls (e.g. telethons)	Legitimate interest (where not on TPS) Consent - where on TPS or	ge donatio ns/parti cipation in annual fund. Also ongoing contact betwee n alumni and student s. Althoug h some alumni do tell us that calls are intrusiv e, other alumni tell us that they look forward to these	Individ I Alumni , Donors , Suppor ters	rersonal e	3rd Party Telethon providers: Buffalo, Rux Burton using 3rd Party Software: Mole, Bit10,	eata, if of	Automa o	n Impact	countri excer	perminant	(if possible)			
		Multi-channel marketing communications - fundraising and stewardship	Print, email, broadcast media (rare), social media (Facebook Twitter, Instagram, Linked-in, Linked-in groups)	k, Legitimate Interest	calls. Facilitat es network ing/enc ourages alumni to particip ate in college as well as peer network s.	Alumni , Donors , Suppor ters							perminant				
	Relationship Management/ Engagement_ FUNDRAISING			Legitimate Interest		Alumni , Donors , Suppor ters							perminant				
			Use 3rd party sources (aggregated vendor databases, e.g. Lexis Nexis, Wealth Engine) to make an assessment of an individual's capacity to give and area of interest		Ensure that when fundrais ers approac h potenti al donor(s) with significa nt	Alumni , Donors , Suppor ters							perminant				

Business		Process_Sub Level 1	Process_ Sub Level 2			Questio Catego Ca	Categories of Recipients [NB: More				tention		Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function				Basis of Processing		ns/futu ries of es re Individ Pe	itiv work to identify third parties]	tion e of of Autor				security measures (if possible)	Schedule Condition for Processing	Processing	
Developn t & Alumn Relations	ni Management/			Legitimate Interest	When conside ring approacc hing a major prospec t (alum or non- alum) to make a significa nt donatio n to a specific project we believe they would have an interest in.	Alumni , Donors , Suppor ters					minant				
	ni Management/		Use an agency to buy-in wealth data relating to alumni/supporters. Dataset would be provided to third party agency and matched to their database (compiled from publically available data). Records with appended wealth assessment data would be returned - this might be for a subset of the data, i.e. those where a match had been made. Data returned includes wealth assessment, career information/history, assets (including value of property); key contacts/network ("circle of friends")		that when fundrais ers approac h potenti al donor(s) with significa nt capacity they do so with a roigent that that that thay have good reason believe is of interest to the individu al(s) and when	Alumni , Donors , Suppor ters	Prospecting for Gold, Factary (Wealth Engine no longer active in UK; Wealthpoint disabled in BBCRM/DARS			per	rminant				
	ni Management/		Produce and distribute publications detailing the impact of donations received. This may be an annual campaign report, college report, annual report or report designed for specific donor (e.g. Trust, Foundation, Corporation, Major Donor). Might also be a report to an internal department or committee.		they ask	Alumni , Donors , Suppor ters				per	rminant				

Business Function	Process	Process_Sub Level 1	Process_ Sub Level 2	Basis of	tion of ns/	estio Catego C futu ries of e	of sens	Categories of Recipients [NB: More itiv work to identify third parties]	Source Loca Existenc			Special Category Data - Data Protection Bill asures Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
				Processing	Legitim re	Individ P	rsonal <mark>e</mark>		data, if of Automa	on n Impact				
t & Alumni	Management/		Produce donor listings for inclusion in publications (print or online), or public display on plaque, panel, building signage,			ed to Alumni N side , p	ime; ssibly				perminant			
Relations	Engagement_		etc.			is - Donors ra								
	FUNDRAISING				at t		nount							
						men Suppor o	gift;							
					t fe	- I I'	ssibly							
					as		rpose							
					tho	-	gift.							
					are									
					usir									
						sent								
					and									
					son									
					te	tima								
						rest -								
					see									
					as									
					tho									
						ause								
					we	are ting								
						sona								
					i i									
						rma								
					tior									
					the									
						nain								
						ethe								
					rw	th								
Developmen	Relationship	Recognition Programmes	Provide appropriate thanking for donors (see also accept and	Legitimate	the	fact side Alumni					perminant			
	Management/		process gift). Thanking may often be done by several parts of		r w						perminant			
Relations	Engagement_		the University and may involve more than one simple		is	Donors								
	FUNDRAISING		acknowledgement.			sona ,								
					ble									
					und									
					te	tima								
						rest								
					bef	ore								
					it									
					bec	ome								
					ster	ward								
					ship									
					ma	rketi								
					ng.									
D	Dalati ii	Descentification Descent		1										
	Relationship Management/		Record membership of and manage donor recognition programmes (e.g. CCB, VCC, Legacy Circles)	Legitimate Interest	Many of these	Alumni					perminant			
	Engagement_		programmes (e.g. CCB, VCC, Legacy circles)	linterest	boards	, Donors								
	FUNDRAISING				are	,								
					invitatio	Suppor ters								
					n only	ters								
					so donors									
					donors are									
					are clear									
					about why									
					why									
					they are membe									
					rs, could									
					have									
					refused,									
					etc.									

Business Function	Process	Process_Sub Level 1	Process_Sub Level 2	Basis of	Descrip Questio C tion of ns/futu r	ies of es of	Categories of Recipients [NB: More sensitiv work to identify third parties]	of the		ti Protectio	of third rds fo	or <mark>schedule (if</mark>	security measures	Special Category Data - Data Protection Bill Schedule Condition for Processing	Special Category Data - GDPR Lawful Basis for Processing	Retention and Erasure Policy
	Relationship Management/ Engagement_ FUNDRAISING			Legitimate Interest	Ensure A relevant , , relevant , , ng, S engagin t g content content sent to right contacts at right time, includin g if asking for a donatio n. Enables us to make evidenc e-based decision s to continu ously improve our progra mme of	ndivid Personal a lumni All relevant available uppor - ers		Gată, IÎ	of Automa on	n impact (perminant	(if possible)			
	Relationship Management/ Engagement_ FUNDRAISING		Create segmentations and calculate and record segment data against constituent records to categorise data subjects based on similar behaviour, e.g. major donor, prospective donor. PROFILING, SEGMENTATION	Legitimate Interest	, C , S	Jumni Jonors uppor ers						perminant				
	Relationship Management/ Engagement_ FUNDRAISING		May share data with volunteers (only with agreements in place), record interaction with volunteers (fact that they are doing this), may also set up relationship management plans for these individuals with those they are engaging.	Interest	Volunte Policy A ers develop , promot ment C e the around , fundrais how S ing manage ti goals to this. their peers (year group, subject area, etc.).	onors						perminant				
t & Alumni	Relationship Management/ Engagement_ FUNDRAISING		Append data via 3rd party vendor (might include wealth screening info; phone numbers) NB: **Believe this practice does not happen any longer**	Interest								perminant				
	Relationship Management/ Engagement_ FUNDRAISING		Select list of alumni to include in activity (removing any opt- outs) and run against TPS to identify any alumni who are on TPS.									perminant				

Business	Process	Process_Sub Level 1	Process_ Sub Level 2	Lawful	Descrip	Questio Ca	atego Catego	ri <mark>Is</mark>	Categories of Recipients [NB: More	Source	Loca Ex	xistenc Data	Data	Names S	afegua Ret	ention	Applicable	Special Category Data - Data Protection Bill	Special Category Data - GDPR Lawful Basis for	Retention and Erasure Policy
Function		_		Basis of			es of es of	sensiti	tiv work to identify third parties]	of the	tion e o	of Prote	ecti Protect	tio of third r	ds for sch	edule (if	security measures	Schedule Condition for Processing	Processing	-
				Processing	Legitim	re In	divid Persor	al e		data. if	of Au	utoma on	n Impa	act countri e	xceptio pos	sible)	(if possible)	-		
Developme	Relationship	Telethons	Where Alumni are on TPS, check for previous	Legitimate		Guidanc A										minant				
t & Alumni	Management/		relationship/opt-in/indication that happy to be included.	Interest		e ,														
Relations	Engagement_					around D	onors													
	FUNDRAISING					teletho ,														
						ns. Su	ippor													
						te														
Developme	Relationship	Telethons	Set ask amount (may be automated calculation based on	Legitimate		Guidanc Al	umni								peri	minant				
t & Alumni	Management/		previous giving). Will always be checked before	Interest		e ,														
Relations	Engagement_		implementing.			around D	onors													
	FUNDRAISING					teletho ,														
						ns. Su	ippor													
						te														