

# Citizens Advice Barnsley

## Local Privacy Policy

### Introduction

At Citizens Advice we collect and use your personal information to help solve your problems, improve our services and tackle wider issues in society that affect people's lives.

We only ask for the information we need. We always let you decide what you're comfortable telling us, explain why we need it and treat it as confidential.

When we record and use your personal information we:

- only access it when we have a good reason
- only share what is necessary and relevant
- don't sell it to anyone

We collect and use the details you give us so we can help you. We have a 'legitimate interest' to do this under data protection law. This means it lets us carry out our aims and goals as an organisation. We'll always explain how we use your information.

At times we might use or share your information without your permission. If we do, we'll always make sure there's a legal basis for it. This could include situations where we have to use or share your information:

- to comply with the law - for example, if a court orders us to share information. This is called 'legal obligation'
- to protect someone's life - for example, sharing information with a paramedic if a client was unwell at our office. This is called 'vital interests'

- to carry out our legitimate aims and goals as a charity - for example, to create statistics for our national research. This is called 'legitimate interests'
- for us to carry out a task where we're meeting the aims of a public body in the public interest - for example, delivering a government or local authority service. This is called 'public task'
- to carry out a contract we have with you - for example, if you're an employee we might need to store your bank details so we can pay you. This is called 'contract'
- to defend our legal rights - for example, sharing information with our legal advisors if there was a complaint that we gave the wrong advice

We handle and store your personal information in line with the law - including the UK General Data Protection Regulation and the Data Protection Act 2018.

You can check our [main Citizens Advice policy](#) for how we handle most of your personal information.

This page covers how we, as your local charity, handle your information locally in our offices.

At Citizens Advice Barnsley, we are committed to protecting your personal information and ensuring transparency in how we collect, use, and store your data. This privacy notice outlines how we process your personal data in line with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018.

## **How We Use Your Information**

### **1. Advice, Information, and Guidance**

We process personal data to provide advice, support, and case management services. This is done under:

- Legitimate Interests (Article 6(f)) – Where we provide advice outside of statutory functions.

- Public Task (Article 6(e)) – Where we perform a function laid down by law.
- Legal Claims (Article 9(2)(f)) – Where advice relates to legal rights (e.g., benefits, debt, housing, and energy issues).
- Substantial Public Interest (Article 9(2)(g)) – Where advice is linked to statutory functions or confidential support services.

## **2. Research, Feedback, and Statistics**

We may collect feedback and anonymised data to improve our services under:

- Legitimate Interests (Article 6(f)) – To assess service impact.
- Archiving, Research, and Statistics (Article 9(2)(j)) – For anonymised research.

Data used for research and statistics is anonymised before sharing with external bodies.

## **3. Fundraising and Donations**

We process donation and fundraising data under:

- Legitimate Interests (Article 6(f)) – To manage donations.
- Legal Obligation (Article 6(c)) – For processing Gift Aid.
- Consent (Article 6(a)) – For marketing communications.

We never sell or trade your data for fundraising purposes.

## **4. Recruitment (Staff and Volunteers)**

We process personal data as part of recruitment under:

- Legitimate Interests (Article 6(f)) – To assess applications.
- Legal Obligation (Article 6(c)) – For DBS checks and right-to-work verification.
- Substantial Public Interest (Article 9(2)(g)) – For safeguarding and equality monitoring.

## **5. Website and Cookies**

We collect limited website user data through cookies and analytics under:

- Legitimate Interests (Article 6(f)) – To monitor website usage.
- Legal Obligation (Article 6(c)) – For security and fraud prevention.
- Consent (Article 6(a)) – For non-essential cookies.

You can manage your cookie preferences via your browser settings.

Please also see our [cookies policy](#).

## Who We Share Your Information With

### Working on your behalf

When you give us authority to act on your behalf, we'll need to share information with third parties.

We may share your data with:

- Regulatory bodies and funders (e.g., Citizens Advice national office, local authorities).
- Partner organisations (for service referrals and collaboration).
- DBS, HMRC, and legal representatives (for compliance and recruitment).
- Website and IT providers (for secure data hosting).

All data sharing is carried out in compliance with UK GDPR, with strict agreements in place to protect your privacy.

## How Long We Keep Your Data

National Citizens Advice is responsible for managing any data in joint client case records. For more information please see their [privacy notice](#).

We retain data only for as long as necessary. Retention periods include:

- Case records – Up to 6 years (managed under National Citizens Advice policy).
- Debt advice records – 6 years (to meet regulatory requirements).
- Safeguarding records – 7 years or longer if required.
- Website analytics and feedback data – Up to 2 years (anonymised after this).

After retention periods expire, your data is securely deleted or anonymised.

## **Your Rights**

You can contact us to:

- find out what personal information we hold about you
- correct your information if it's wrong, out of date or incomplete
- request we delete your information
- ask us to limit what we do with your data - for example, ask us not to share it if you haven't asked us already
- ask us to give you a copy of the data we hold in a format you can use to transfer it to another service
- ask us stop using your information

## **Who's responsible for looking after your personal information**

The national Citizens Advice charity and your local Citizens Advice operate a system called Casebook to keep your personal information safe. This means they're a 'joint data controller' for your personal information that's stored in our Casebook system.

Each local Citizens Advice is an independent charity, and a member of the national Citizens Advice charity. The Citizens Advice membership agreement also requires that the use of your information complies with data protection law.

You can [find out more about your data rights on the Information Commissioner's website](#).

## **If you need to get in touch**

To exercise your rights or for any concerns, contact us at:

[admin@barnsleycab.org.uk](mailto:admin@barnsleycab.org.uk)

## **Contacting the Information Commissioner's Office (ICO)**

You can also raise your concern with the Information Commissioner's Office which regulates data protection law in the UK. if you are unhappy with how we have used your personal information. They will normally expect you to have made a complaint to us directly in the first instance.

- [Visit the ICO website](#).
- Address: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF
- Helpline number: 0303 123 1113