

Coram Potential Plus Consultancy Service Privacy Notice

This privacy notice sets out how we collect, use and store personal information shared with us when you engage Coram Potential Plus to provide consultancy services. When sharing personal data with Coram Potential Plus, you can be sure that:

- only the information that we need to be able to support you is collected
- information is collected and held securely, so your information is safe and secure
- your data is used to make your experience with us personalised, supportive and efficient
- you can review and update the information we hold about you at any time
- your preferences can be changed at any time, so you have full control over which communications you receive from us.

Coram Potential Plus is committed to meeting and complying with all its obligations under the Data Protection Act 2018, UK General Data Protection Regulations and the Data (Use and Access) Act 2025 and is registered with the Information Commissioner's Office for that purpose.

Who we are

Coram Potential Plus supports children and young people with high learning potential, their families and the professionals who work with them. Coram Potential Plus is part of the Coram Group, a group of charities and organisations working to improve the lives of children and young people.

The Coram Group's Data Protection Officer (DPO) is Christine Kelly. If you have any questions, concerns or complaints about this Privacy Notice or the processing of your personal data, please contact Coram Potential Plus in the first instance by email at amazing.children@potentialplusuk.org or the Coram DPO by email at dataprotection@coram.org.uk or by writing to: Data Protection Officer, Coram, 41 Brunswick Square, London, WC1N 1AZ.

What types of personal information do we collect?

If you contact us to enquire about consultancy services, we may initially collect:

- Your name
- Your organisation (where applicable)
- Contact details for communication
- Information about your enquiry or consultancy requirements

When you commission consultancy services for your family, we collect:

- Your full name **(mandatory field)**
- Your preferred email address to arrange the booking **(mandatory field)**
- Contact telephone number **(mandatory field)**
- Membership Status **(mandatory field)**
- Name and age of child or young person **(mandatory field)**
- Type of education setting of child or young person **(mandatory field)**
- Relationship/role relative to child or young person **(mandatory field)**
- Household members
- Child or young person's strengths **(mandatory field)**
- Child or young person's needs, challenges or barriers **(mandatory field)**
- How child or young person feels about learning
- How and if school or other professionals have been engaged **(mandatory field)**
- Why you are booking a consultancy session **(mandatory field)**
- What you are seeking help with **(mandatory field)**
- The current situation or concern **(mandatory field)**
- What outcome would feel helpful or successful.
- Any accessibility requirements

When you commission consultancy services as a professional, we collect:

- Your full name **(mandatory field)**
- Your preferred email address to arrange the booking **(mandatory field)**
- Contact telephone number **(mandatory field)**
- Membership Status **(mandatory field)**
- Name and age of child or young person **(mandatory field)**
- Type of education setting of child or young person **(mandatory field)**
- Relationship/role relative to child or young person **(mandatory field)**
- Place of work **(mandatory field)**
- What capacity you are involved in support, education or decision-making for the family, child or young person **(mandatory field)**
- Child or young person's strengths **(mandatory field)**
- Child or young person's needs, challenges or barriers **(mandatory field)**
- Why you are booking a consultancy session **(mandatory field)**
- What you are seeking help with **(mandatory field)**
- The current situation or concern **(mandatory field)**
- What outcome would feel helpful or successful.
- Any accessibility requirements

How and why we use your personal information

Most of the information we collect is provided to us directly by you to provide the consultancy services you have commissioned from us. If you choose not to share personal information with Coram Potential Plus, we may not be able to assist you or provide you with consultancy services.

The information you provide allows us to:

- Deliver the consultancy services you have commissioned
- Communicate with you about the consultancy service and session
- Manage bookings, contracts, invoices and administration
- Prepare reports, recommendations and other agreed consultancy outputs.
- Transcribe online meetings using Microsoft Teams to support accurate record-keeping, administrative efficiency and the preparation of consultancy outputs.

Our lawful basis for processing your information

Coram Potential Plus collects and processes personal data in order to perform a contract, or when taking steps to enter into a contract to provide consultancy services.

We may also ask for your consent to send information about new services, events, fundraising campaigns or organisational updates. You can withdraw your consent at any time by contacting us.

There are also legal obligations under data protection laws around processing *special categories of personal data*. We process this type of data (including information related to ethnic origin, religious beliefs and data concerning health) when providing confidential advice and/or when carrying out our assessments. We process this information with your explicit consent.

Who we share your information with

Coram Potential Plus are the data controller for the personal information we collect. We sometimes however need to share your data with third-party processors who help us to provide our services. We oblige these third parties to protect your information with appropriate security measures and prohibit them from using your information for their own purposes or from disclosing your information to others.

These third parties include:

- Microsoft 365 (including Outlook, Teams, SharePoint, OneDrive, Bookings, Forms and Copilot) for secure communication, document creation, collaboration, meeting transcription and administrative support.
- Xero accounting software.

- Payment providers and banks that enable us to receive and process payments (e.g. PayPal, PaySafe, Stripe).
- Website hosting and support providers.
- Other contacts you have nominated and authorised us to liaise with regarding the consultancy.
- External associates or consultants engaged to support delivery of Coram Potential Plus services, where applicable and subject to appropriate confidentiality and data processing obligations.

We may use Microsoft 365 Copilot within our secure Microsoft 365 environment to assist solely with organising, summarising and presenting information. All professional analysis, conclusions, recommendations and reports are developed by our consultants using their professional judgement. Where personal information is processed using Microsoft 365 Copilot, it remains within our secure Microsoft 365 environment and is processed in accordance with Microsoft's contractual commitments and applicable data protection laws.

We will never share your personal data with other companies or organisations for their own marketing or promotional purposes.

We may also be required to share information in certain instances to comply with legal obligations, such as safeguarding a child or young person which may require sharing information with relevant authorities.

Your rights

Under data protection laws, you have a right to request a copy of some, or all of the personal information Coram holds about you. You also have a right to correct inaccurate data, and, in some circumstances, may have a right to request erasure of data, data transfer (or “data portability”), and to object to or restrict processing. To find out more about your rights, to exercise any of your rights, or if you have any questions or concerns about data protection at Coram, email dataprotection@coram.org.uk or write to the Managing Director of HR & Compliance, 41 Brunswick Square, London WC1N 1AZ.

How long we will keep your information for

For records related to Coram Potential Plus Consultancy Services:

Consultancy enquiries	12 months
Consultancy contracts and correspondence	6 years from date of transaction

Meeting transcripts	Deleted once the consultancy has concluded and any agreed outputs have been finalised, unless required for legal, contractual or safeguarding purposes.
Consultancy summaries, action plans, and recommendations	6 years from date of transaction
Financial records	6 years from the end of the financial year

In line with data protection laws, Coram Potential Plus will not retain your information for any longer than is necessary. For a detailed view of what information we hold, for how long, and the justifications for the retention period, you can view our [Retention Schedule here](#).

How we will store your information and keep it secure

We only use systems which are proven to be resilient, and which will handle your personal data with confidentiality and integrity. We use encryption and authentication tools to keep your data safe and secure. You can also be sure that your personal data is protected behind secured networks and only accessible by authorised people, who are viewing or updating your information according to agreed procedures.

Complaints

Coram Potential Plus tries to meet the highest standards when collecting and using personal information. For this reason, we take any complaints we receive about this very seriously and encourage people to bring it to our attention if they think that our collection or use of information is unfair, misleading or inappropriate. You have the right to complain at any time to Coram's Data Protection Officer:

- By email: dataprotection@coram.org.uk
- Or write to us at: Data Protection Officer, Coram, Coram Community Campus, 41 Brunswick Square, London, WC1N 1AZ

In the event of a conflict concerning the processing of your personal data, you have the right to lodge a complaint with the supervisory authority in the UK:

Information Commissioner's Office

0303 123 1113

Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5A

www.ico.org.uk