1. **Who we are and how to contact us**

1.1. The Yorkist History Trust (‘The Trust’) was formally constituted in October 1985, as The Richard III and Yorkist History Trust, in order to ‘further education, learning, and research related to the history of late medieval England (and in particular the life and reign of King Richard III) and to disseminate the results of such education, learning and research’.

1.2. The Trust was recognised by the Charity Commission for England and Wales and registered as charity number 327005 in February 1986.

1.3. The Trustees’ principal duties include commissioning new publications and see them through to publication, and to assess applications from scholars and publishers for financial assistance towards their own research and the expenses of publication.

2. **How we collect and use your personal information.**

2.1. The Trust takes your privacy and personal data seriously.

2.2. Personal data includes, but is not limited to:

- title;
- full name;
- contact address;
- e-mail address;
- telephone number; and
- for successful grant applicants – bank details to facilitate payment.

2.3. Personal data is obtained principally from the following sources:

(i) Grant applicants;
(ii) Authors; and
(iii) Donors.

This document details the different procedures to be followed in using this data.

2.4. **Grant Applicants and Authors**

2.4.1. Definition. The processes established by the Trust to consider applications for the provision of support for (a) publication and (b) research grants are similar and the following applies to applicants and/or organisations in both categories.
2.4.2. Permission to use personal details is given by applicants when making a submission for a Small Grant, Publication Grant or an Advanced Research or Monograph Grant from the Trust. Applications can also include the personal data of others involved in the application, for example that of a research assistant, supervisor or reader of a thesis, and it is the responsibility of each applicant to receive their consent to share their personal data on any and all applications made to the Yorkist History Trust.

2.4.3. When making a grant application, the applicant will be required to acknowledge and agree that all personal details, without further specific consent, may be passed to the Managing Trustees, or such other Trustee and/or Officer, who have been delegated by the Trust to make all decisions on grant applications.

2.4.4. The personal data supplied in each application will be visible to the Trustees and Officers for the purposes of determining and administering the grant application.

2.4.5. For applications that are unsuccessful, all personal details as submitted on the application will be kept for a period of six years and will then be destroyed by the Managing Trustees and Officers. The Trust will keep a record of the name of the applicant and the nature/title of the work for a period of six years from submission date to avoid possible duplication. Unsuccessful applications will be reported to the Trust’s Annual General Meeting (AGM) but only on a numerical basis.

2.4.6. For successful grant applicants, a report on grant activities is presented to all Trustees and Officers at the Trust’s AGM in the Annual Report. This includes the name of the applicant, any associated parties involved in their application, the nature/title of the work, the total grant approved, the amount of grant paid to date and progress of the project. It is the responsibility of the applicant to sign and agree to this on the original application form. This report will be retained by the Trustees and Officers as a permanent record of its activities.

2.4.7. Where the grant has resulted in a publication, the amount of the grant is presented to trustees at the AGM. The application will be destroyed by the Trustees and Officers after six years from the submission date.

2.4.8. Where it has been mutually agreed that the grant will not result in a publication, once reported to the AGM the application will be deleted from future reports. All related documentation relating to the project will be deleted by the Trustees and Officers after six
2.5.  Donors

2.5.1. Personal details provided by donors - as defined in clause 2.2 of this document - are used by the Trust for acknowledgement purposes and where a Gift Aid nomination is supplied, data is used in connection with annual submissions to His Majesty’s Revenue and Customs (HMRC) for Gift Aid application purposes.

2.5.2. The identity of donors, their donations and personal data is recorded in the Trust’s income register and documentation is retained in accordance with Section 3 below.

2.6. For administrative purposes the Trust will keep a record of the personal data of all applicants, the nature of their work and the title of their research for a period of six years. Similarly, a record will be retained of authors and their work as well as a list of donors and donations together with any Gift Aid declarations for a six year period from the date of the application and the date of the donation.

2.7. Paper copies of grant applications, submissions by authors and donors’ details together with any associated grant aid declarations will be kept securely by Trustees and Officers and electronic copies will be kept on pass-worded computers or other electronic devices such as i-Pads or similar.

2.8. Donors, grant applicants and authors will be asked whether the Trust may use their contact information for promotional purposes in connection with future Trust publications or events. This will only maintain where written consent has been provided to the Trust.

3. Financial details

3.1. Both the grant applicant, and any other party involved in the application, will be required to agree to have their personal data available to the Trust’s Treasurer for payment. This consent is required on the application form. A similar consent is required of authors to facilitate payment.

3.2. To process payments, the Trust’s preferred method is via bank transfer and applicants will be required to provide account details to be passed to the Trust’s Treasurer for this purpose.

3.3. The Trust is legally required to keep all financial details, including but not limited to bank account information, payment registers and receipts for a period of six years. This data is retained by the Treasurer only. After six years the Treasurer will destroy the applicant’s financial data.

3.4. Where an application is unsuccessful or does not result in a payment, any financial details supplied will not be retained and will be destroyed by the Trustees and Officers of the Trust.
4. Submission to third parties

4.1. The Trust will never sell your personal data or share it with a third party other than as detailed below.

4.2. By signing and submitting an application for a grant, where this relates to a publication, applicants have consented to such final publication being advertised by the Trust on, but not limited to, its website, social media and publicity flyers.

4.3. The Trust is legally required to present its Annual and Financial Report to the Charity Commission and also submit it to an independent auditor and external auditor for statutory inspection purposes. This report contains information on research that has resulted in or is about to lead to a publication, with the name of the publication, together with collated information about work of sponsored authors and donations. The financial part of the report contains no personal details.

4.4. The Charity Commission publishes details only of the Trustees, Secretary and Treasurer on its website and makes no reference to details of donors or grant applicants without specific consent.

4.5. Where the Trust makes an application to HMRC for Gift Aid – see section 2.5 – no personal details of donors and related donations are published by HMRC. Such data is used solely for Grant Aid calculation purposes.

5. Adoption

5.1. This policy was approved and adopted by the Trustees on 6th March 2024.

6. Our contact details

6.1. No information is collected through our website but you can contact the Trust by writing to us – see below, emailing the Secretary (yorkisthistorytrust@gmail.com), or using the contact link on the website.

6.2. Contact address for mailing:

The Yorkist History Trust
PO Box 6302
NEWBURY
RG14 9QU