

Allison Surveying Limited PRIVACY POLICY

I. Introduction

- a. This Privacy Policy is provided to comply with the General Data Protection Regulations (GDPR)
- b. Allison Surveying Limited is a data controller, as defined by the Regulations, in that we determine the purposes and means of the processing of personal data that we collect.
- c. We take the privacy of your personal data seriously. We collect data that is necessary for us to operate our day to day business, fulfil our obligations to you and comply with accounting, taxation, insurance, legal and professional requirements. We do not hold, process or share your data in circulation lists for mass marketing purposes, such as newsletters or general invitations to use our services or those of others. We do not harass our clients with general marketing calls, emails or visits.
- d. This Notice explains
 - What data we hold about you
 - Why we hold your data and how we use it
 - The legal basis for holding your personal data
 - How we keep your data secure
 - How we share your data
 - How long we keep your data
 - Your rights in relation to personal data
 - Who to contact about your personal data

2. What data do we hold about you and how do we collect it?

- a. We collect data about you when:
 - i. You make an enquiry, as a potential client, about the services we can offer you
 - ii. We approach you, as a potential supplier or contractor; or you offer your services to us
 - iii. You contact us for any other business purpose
 - iv. A third party known to you provides us with your contact details, on an individual basis, and introducing you as a prospective client, supplier or contractor. This data should always be provided with your consent.
- b. Please do not supply us with any other person's personal data, unless you have their consent
- c. We acquire personal data from emails or other electronic communication from you, from letters and documents you send us, from your website, through personal or telephone contact with you. We may process data contained in or relating to any communication that you send us.

We may also acquire your personal data from third parties who have your permission to provide information to us, for example you may ask someone to pass your details to us with a view to us initiating contact with you.

- d. The legal basis for this processing is consent, our legitimate interest, and the performance of a contract and/or taking steps, at your request, to enter into a contract.
- e. The type of data we collect about you:
- Name
 - Address (home and/or business)
 - Email address
 - Telephone number
 - Address of premises related to our business with you (eg a site address)
 - If you supply a service to us, we will also collect your bank details
 - We may also acquire other data incidental to your communications with us, for example your job title, role and place of employment on an email from your business account.
- f. Personal data may be recorded in more than one place, for example, in project documentation and in our financial records.
- g. We may also acquire other personal data about you that you choose to give us. For example, you may give us the name of a family member who is a key holder for premises, or ask us to contact you at another address associated with you. You may provide us with property access details (eg door code entry number) or other private information.
- h. If we take photographs of your premises, it is possible that we may incidentally or inadvertently capture personal information, for example images of you, your family or private documents. We will delete these photographs as soon as we become aware of their content (which we would expect to do on the same day as the photographs are taken).
3. Why do we hold your data and how do we use it?
- a. We use your data to fulfil our contract with you, for example:
- i. To deliver the service you have requested of us: for example, to correspond with you about the work we are doing and in due course to invoice you for our services
 - ii. To maintain the necessary professional records of the project
- b. We also hold your data in order to comply with accounting, taxation, insurance, legal and professional RICS requirements.
- c. We do not hold, process or share your data on any mailing lists for mass marketing purposes.
- d. We may use your data to contact you for conventional ancillary business purposes, for example:
- i. To ask you for a testimonial or other feedback on our service to you.
 - ii. To ask your permission to show details of our work in respect of your premises, including photographs, on our website or in presentations, etc.
 - iii. To invite you to submit your project for a RICS or other design Award

The legal basis for this is consent and our legitimate interest. When we no longer need to retain your personal details for accountancy, insurance, taxation or other legal or professional reasons, we will also delete any contact details we are holding for the above purposes

- e. We may use your personal data to contact you if we become aware of any actual or potential health and safety issue in relation to your property. The legal basis for this is our legitimate interest as a RICS registered practice with a duty to meet professional standards of service.
- f. We may process any of your personal data where necessary to establish or defend legal claims. The legal basis for this processing is our legitimate interests. We may disclose your information to comply with a legal requirement or court order. We will make reasonable attempts to communicate with you in advance if we are legally permitted to do so.
- g. We may process your personal data as necessary to obtain or maintain insurance, manage risks, or obtain professional advice. The legal basis for this processing is our legitimate interests.
- h. We may also process any of your personal data where it is necessary to comply with a legal obligation or contract, or in order to protect your vital interest or that of another person.

4. The legal basis for holding your data

a. **Contract**

We hold and process personal data necessary for us to fulfil our contract with you or because you have asked us to take specific steps (such as a site visit) before entering into a contract

b. **Legal obligation**

We need to hold and process personal data to comply with the law, such as planning law or tax law (personal data will be on planning applications and on our invoices, for example).

c. **Consent**

We may also hold data with your consent, such as additional addresses and contact details, including data that you provide in emails to us.

d. **Legitimate interest**

We may hold your data in our legitimate interests, that is the proper administration and management of our business and the performance of a contract between us.

5. How do we keep your data secure?

- a. We have simple business records. We do not have complex systems to record, process or transfer data.
- b. Your data is held securely in digital and hard copy form. It is held in more than one place for reasons of business efficiency and to ensure we have backups to maintain business continuity.
- c. Please note that data sent to and from us by email is inherently not secure in transit over the internet.

6. When do we share personal data?

We share your data with others for the following purposes:

- a. We may share your data as part of the work we do for you: for example, your name and address will appear on a planning application we prepare for you and submit to the local authority; and we will give your contact details to contractors who might work on your project
- b. We may need to share your data with our accountants and business advisers and with HMRC as part of the business records that they necessarily require access to. We may disclose your personal data to our insurers and/or professional advisers as necessary for the purposes of insurance, risk management, professional advice or establishing or defending legal claims
- c. We may share your data with IT consultants in order to resolve operational IT problems and restore IT functions. We will require them to delete your data as soon as they have resolved the problem.
- d. If Allison Surveying Limited merges with another practice or our business, or the practice is transferred in whole or in part to a third party, or if contingency plans are implemented with another surveying practice to ensure business continuity in an emergency, your personal data would become available to the new business to use for the same purposes as set out in this policy.
- e. We may disclose your personal data if required to comply with a legal obligation, or to protect your vital interests or the vital interests of another person. We may also disclose your personal data if necessary to establish or defend legal claims.

7. How long do we keep your personal data for?

- a. We retain your data in relation to the records we keep for accountancy, taxation, insurance, and legal requirements. This is in accordance with our legitimate professional interest in securing the full benefits of professional indemnity insurance by keeping full records of work undertaken, and takes account of legally prescribed retention periods.
- b. We retain your data in relation to the professional records required by the RICS in accordance with the retention periods prescribed by the RICS
- c. In the unlikely event of legal, insurance or similar dispute or complaint, we may retain your data until the matter is resolved.
- d. You should be aware that building plans and other records of your project may include your name and address. Records that include your name and address will be destroyed after the expiry of the retention periods described above. You therefore need to ensure you retain any copies that you may require in future for your personal records.
- e. Personal data will be retained for a minimum of 24 months.

8. When we no longer need to retain your personal details for accountancy, insurance, taxation, legal or professional reasons, we will also delete any data we are holding for any other business purposes.
Updates to this policy

We may update this policy from time to time by publishing a new version on our website. You should review the policy on the website periodically to ensure you are content with any changes

9. Your rights in relation to personal data

Full details of your rights and how to exercise them are available from the Information Commissioner's Office website.

In summary, your rights are:

a. Information

You have a right to be informed if your personal data is being used. The Privacy Policy explains how we use your data.

b. Access

You have the right to find out if we are using or storing your personal data. You have a right to get copies of the data we hold, provided it does not affect the rights and freedoms of others. We will provide a copy of your data free of charge. We may charge a reasonable fee for any subsequent copies.

c. Rectification

You have the right to have your data corrected. You can challenge the accuracy of the personal data we hold about you.

d. Deletion

In some circumstances, you have the right to have your data deleted. There are exclusions to this right, as explained on the Information Commissioner's website.

e. Restriction

In some circumstances, you have the right to limit how we use your data.

f. Data portability

You have the right to get your personal data from us in a way that is accessible, that is in a structured and commonly used format. We will usually provide data in Word or Excel format.

g. Objection

You have the right to object to the processing or use of your data in some circumstances as explained on the Information Commissioner's website

h. Complaint

You have the right to tell us if you are concerned about how we are using your data. You have the right to complain to the Information Commissioner if you consider that we have infringed data protection laws.

i. Consent

44 Chapel Road, Morley St Botolph, Wymondham, Norfolk, NR18 9TF
Company Number 12298846 (Registered in England and Wales)

Where our legal basis for processing your data relies on consent alone, you have the right to withdraw your consent to the processing of your data.

10. Who to contact

If you wish to obtain a copy of your personal data or have any question or complaint about the data we hold about you, please contact:

John Allison
44 Chapel Road, Morley St Botolph, Wymondham, NR18 9TF
john@allisonsurveying.co.uk
07884 437 072

We aim to deal with any queries within one week, but would normally expect to answer any question on the same day. We are legally required to respond within one month.

Allison Surveying Limited
Updated: 21 July 2023