

# PRIVACY POLICY

Updated January 2019



## Privacy Notice

Grove House (Surveyors) Limited trading as Grove House Chartered Surveyors is a Limited Company. We are committed to ensuring that your privacy is protected. Should we ask you to provide us with certain information by which you can be identified, you can be assumed that it will only be used in accordance with this privacy statement.

Grove House may update this policy from time to time by updating this page. Please check frequently to review any updates to our Privacy Policy to ensure you are happy with any changes.

For the purpose of data protection legislation, our data controller is Grove House (Surveyors) Limited trading as Grove House Chartered Surveyors registered in England and Wales. Registration Number: 11663738 (herein referred to as “we”, “us” or “our”, “Grove House” in this privacy notice). Registered Office: 16 Ryestone Drive, Ripponden, West Yorkshire, HX6 4JW.

## Personal Data Collection

Grove House only collect and retain information specifically provided by you or through publicly available sources of information, eg. Land Registry or telephone directories. We only collect and retain information where we are required to process the information to meet our client contract or regulatory obligations, or where you have provided it to us to benefit from publications and services produced by us or to learn more about our services.

The information you provide to Grove House may include your name, job title, address, email address, telephone numbers, land ownership, tenancy information or financial, business trading performance or banking information along with other information which may be relevant to our contract with you.

## Types of Data

Personal data, or personal information, means any information about an individual from which that person can be identified. It does not include data where the identity has been removed (anonymous data).

We may collect, use, store and transfer different kinds of personal data about you which we have grouped together follows:

- **Identity Data** includes first name, maiden name, last name, marital status, title, gender;
- **Contact Data** includes address, email address and telephone numbers;
- **Financial Data** includes bank account along with business trading and accounting data;
- **Transaction Data** includes details about payments to and from you;
- **Technical Data** includes internet protocol (IP) address, browser type and version and other technology on the devices you use to access our website;
- **Marketing and Communications Data** includes your communication preferences.

## Failing to Provide Personal Data

Where we need to collect personal data by law, or under the terms of a contract we have with you and you fail to provide that data when requested, we may not be able to perform the contract we have or are trying to enter into with you. In this case, we may have to cancel a service you have with us but we will notify you if this is the case.

## Marketing

We may use your Identity, Contact and Technical data to form a view on what we think you may want or need, or what may be of interest to you. This is how we decide which products, services and offers may be relevant for you (we call this marketing).

You may receive marketing communications from us if you have requested information or used our services and, in each case, you have not opted out of receiving that marketing.

## Social Media

We may use details of the service we provide to you in order to update our website with news items or to post on social media such as Linked In. In such communication, we may decide to mention you as a client or a tenant, including your Identity Data and details of the services we have carried out for you, including property details.

Information which you post or disclose on Grove House's social media or any community forums (for example, Linked In, Facebook or any social media applications or websites) is public information. Grove House cannot control the use of this information and advise the exercise of caution when disclosing any information in public areas.

## Third Party Marketing

We will get your express opt-in consent before we share your personal data with any company outside of Grove House Chartered Surveyors for marketing purposes.

## Use of Personal Data

Grove House use personal information to fulfil client contracts, to understand your needs and provide you with a better service. In particular we use your data for the following reasons:

- To provide professional consultancy services to clients and conduct everyday business activities;
- Where we need to undertake the contract that we are about to enter into or have entered into with you;
- Where we are processing information in relation to client contracts, we are doing so on behalf of our clients and for that specific contract;
- Internal record keeping;
- Where relevant, we may use the information to improve our services;
- Where you have requested it, we may periodically send emails about our services or other information which we think you might find interesting using email or postal addresses provided;

Where we need to [process](#) your personal data for compliance with legal or regulatory obligations.

## Purpose for Using Personal Data

We have set out below, in a table format, a description of all the ways we plan to use your personal data, and which of the legal bases we rely on to do so. We have also identified what our legitimate interests are where appropriate.

## Change of Purpose

We will only use your personal data for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose.

If we need to use your personal data for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

Please note that we may process your personal data without your knowledge or consent, in compliance with the above rules, where this is required or permitted by law.

## Legal Basis for Processing Data

The legal basis for Grove House to process your personal data is dependent on the purpose that information has been gathered. Where information has been gathered to meet the requirements of client contracts, the information is gathered and processed under 'Legitimate interest', as defined by Article 6 of the General Data Protection Regulations.

**Legitimate Interest** – means the interest of our business in conducting and managing our business to enable us to give you the best service/product and the best and most secure experience. We make sure we consider and balance any potential impact on you (both positive and negative) and your rights before we process your personal data for our legitimate interests. We do not use your personal data for activities where our interests are overridden by the impact on you (unless we have your consent or are otherwise required or permitted to by law).

**Performance of Contract** – means processing your data where it is necessary for the performance of a contract to which you are a party or to take steps at your request before entering into such a contract.

Where information has been provided by you it has been done under the 'consent' basis for lawful processing.

### Location of Data

We will only retain your personal data for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

To determine the appropriate retention period for personal data, we consider the amount, nature, and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data and whether we can achieve those purposes through other means, and the applicable legal requirements.

We will retain your information for as long as is necessary only for the purpose for which it was collected. We will usually keep information about you for a maximum of 15 years after the end of our relationship with you unless:

- Obligations to our regulators require otherwise;
- We require the data in relation to a claim;
- For legal reasons we are required to remove such data from our records prior to this period.

This period has been selected in line with the Royal Institution of Chartered Surveyors (RICS) suggested retention period.

Grove House takes the security and privacy of its customers' personal information extremely seriously. We have strict internal procedures which cover the storage, access and disclosure of your information.

We have put in place appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process your personal data on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected personal data breach and will notify you and any applicable regulator of a breach where we are legally required to do so.

You can access our website home pages and browse our website without disclosing your personal data. However, Grove House does gather information each time you visit our website through the use cookies to manage the operation and performance of our sites. This information may be processed by a sub-contractor to provide a better service from our website.

### File Storage

Grove House temporarily stores hard copy data files whilst undertaking our contract with you. Upon completion of this work, we store data electronically on our central server which is backed up using Cloud storage.

### Cloud Storage

Grove House utilises secure cloud electronic storage systems to store your digital personal data. This means that your information may be processed on behalf of Grove House by a cloud provider and could be stored in different locations around the UK. We use internal organisational procedures and contractual measures to protect your personal data and to impose appropriate security and data protections requirements on cloud service providers.

### Sharing Personal Data

We would draw your attention to the fact that Valuations may be shared with for [investigation by the RICS](#), on a confidential basis, for the purposes of the RICS's audit, conduct and disciplinary regulations, in order to ensure compliance with the Red Book.

Grove House does not provide information to any third parties other than to meet client contracts for which the information was obtained and processed or to meet statutory and legal requirements. It may be necessary to share information with Grove House approved sub-contractors where they are undertaking work for us to fulfil our client contract requirements.

Where we are processing information in relation to client contracts, we are gathering and processing the data on behalf of our clients. Information which is held may be required to share or pass the information on to the client, or their approved contractors and this will only occur in relation to the specific purpose the information was collected for.

We share data with our bank, our insurers and brokers, external service suppliers that we use to make our business more efficient, HRMC and other regulatory bodies.

We require all third parties to respect the security of your personal data and to treat it in accordance with the law. We do not allow our third-party service providers to use your personal data for their own purposes and only permit them to process your personal data for specified purposes and in accordance with our instructions.

In addition, we may share your data with third parties to whom we may choose to sell, transfer, or merge parts of our business or our assets. Alternatively, we may seek to acquire other businesses or merge with them. If a change happens to our business, then the new owners may use your personal data in the same way as set out in this privacy notice.

Under certain circumstances Grove House is under a duty to disclose or share your personal data in order to comply with legal or statutory obligations, or in order to enforce or apply our terms of use and other agreements; or to protect the rights, property or safety of our customers, our regulator or others. This includes exchanging information with other companies and organisations for the purposes of fraud protection and prevention of money laundering.

### Data Outside European Economic Area

Grove House may be required to transfer data outside of the European Economic Area (EEA). Grove House will only do so if adequate protection measures are in place in compliance with data protection legislation.

### Your Rights:

You have the following rights:

**Request access** to your personal data (commonly known as a "data subject access request"). This enables you to receive a copy of the personal data we hold about you and to check that we are lawfully processing it.

**Request correction** of the personal data that we hold about you. This enables you to have any incomplete or inaccurate data we hold about you corrected, though we may need to verify the accuracy of the new data you provide to us.

It is important that the personal data we hold about you is accurate and current. Please keep us informed if your personal data changes during your relationship with us. If any of the information changes, for example if you change your email address, name or should you wish to cancel your client registration with us, please let us know the correct details by sending an email to [lorna@grovehouse.ltd](mailto:lorna@grovehouse.ltd).

**Request erasure** of your personal data. This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have successfully exercised your right to object to processing (see below), where we may have processed your information unlawfully or where we are required to erase your personal data to comply with local law. Note, however, that we may not always be able to comply with your request of erasure for specific legal reasons which will be notified to you, if applicable, at the time of your request.

**Object to processing** of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground as you feel it impacts on your fundamental rights and freedoms. You also have the right to object where we are processing your personal data for direct marketing purposes. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information which override your rights and freedoms.

**Request restriction** of processing of your personal data. This enables you to ask us to suspend the processing of your personal data in the following scenarios:

- If you want us to establish the data's accuracy;
- Where our use of the data is unlawful but you do not want us to erase it;
- Where you need us to hold the data even if we no longer require it as you need it to establish, exercise or defend legal claims;
- Where you have objected to our use of your data but we need to verify whether we have overriding legitimate grounds to use it.

**Request the transfer** of your personal data to you or to a third party. We will provide to you, or a third party you have chosen, your personal data in a structured, commonly used, machine-readable format. Note that this right only applies

to automated information which you initially provided consent for us to use or where we used the information to perform a contract with you.

**Withdraw consent** at any time where we are relying on consent to process your personal data. However, this will not affect the lawfulness of any processing carried out before you withdraw your consent. If you withdraw your consent, we may not be able to provide certain products or services to you. We will advise you if this is the case at the time you withdraw your consent.

You may contact our Data Protection Officer, Lorna Pass of Grove House Chartered Surveyors.

### **Fees**

Any access request will be processed as required by law and will be free of charge. However, we may charge a reasonable fee if your request is clearly unfounded, repetitive or excessive. Alternatively, we may refuse to comply with your request in these circumstances.

### **Information Required by Us**

We may need to request specific information from you to help us confirm your identity and ensure your right to access your personal data (or to exercise any of your other rights). This is a security measure to ensure that personal data is not disclosed to any person who has no right to receive it. We may also contact you to ask you for further information in relation to your request to speed up our response.

### **Response Timescale**

We try to respond to all legitimate requests within **one month**. Occasionally it may take us longer than a month if your request is particularly complex or you have made a number of requests. In this case, we will notify you and keep you updated.

### **Complaints Procedure**

If you are dissatisfied with any service provided by Grove House, you can make a complaint through our formal complaints procedure which complies with the regulations of The Royal Institution of Chartered Surveyors (RICS). If you wish to view our complaints handling procedure (CHP) or to make a complaint, please contact Grove House Chartered Surveyors at 16 Ryestone Drive, Ripponden, West Yorkshire, HX6 4JW or by sending an email to [lorna@grovehouse.ltd](mailto:lorna@grovehouse.ltd).

If you are not satisfied with the processing of your data, you have the right to make a complaint at any time with the Information Commissioner's Office (ICO) which is the supervisory authority for data protection in the UK ([www.ico.org.uk](http://www.ico.org.uk)). We would, however, appreciate the chance to deal with any concerns before you approach the ICO so that we may take appropriate action to resolve the issue in the first instance.

### **Contact Us**

Questions, comments and requests regarding this Privacy Policy are welcomed and should be addressed to the Data Protection Officer, Lorna Pass at [lorna@grovehouse.ltd](mailto:lorna@grovehouse.ltd).