

## Privacy Notice

### Introduction

e.surv is committed to protecting your privacy and this notice sets out how we handle and or process your personal data.

In this Privacy Notice the terms, 'e.surv', 'we', 'us' and 'our' are references to e.surv Ltd (trading as e.surv Chartered Surveyors), company number 2264161, having a registered office address of Lahnstein House, Gold Street, Kettering NN16 8AP. E.surv is part of the LSL Property Services plc group of companies of which the ultimate parent company is LSL Property Services plc.

This Privacy Notice sets out the basis on which any personal data we collect from you through our website ([www.esurv.co.uk](http://www.esurv.co.uk)) (the "Site"), or that you provide to us via other methods, will be processed by us. Please read the following carefully to understand our views and practices regarding your personal data and how we will treat it, including:

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Your privacy is important to us, and we are committed to keeping your information secure and managing it in accordance with our legal responsibilities under applicable data protection laws. We are registered with the UK Information Commissioner's Office (ICO) as a data controller under registration number Z7734013.

By accessing, browsing or otherwise using the Site you confirm that you have read and agreed to this Privacy Notice. If you do not agree with any part of this Privacy Notice, you

should not use the Site or use our services unless you are using the Site or our services as a prospective employee.

We reserve the right to change the contents of the Site, including this Privacy Notice at any time, by posting such changes on the Site. It is your responsibility to familiarise yourself with the Privacy Notice regularly to ensure that you are aware of any changes. Your continued use of the Site following the posting of any such changes will constitute your acceptance of the revised Privacy Notice.

## Services

e.surv Chartered Surveyors (e.surv) is a leading provider of residential property risk and surveying services, committed to delivering accurate and professional guidance on time, every time.

Trading since 1989, e.surv now employs over 600 RICS-registered valuers, supported by a network of consultant surveyors, and a team of risk and data analysts. We provide property risk expertise, RICS survey reports, and residential property valuations for major UK mortgage lenders and private customers.

In June 2013, e.surv acquired Scottish surveying business, Walker Fraser Steele, and still operate under this brand across Scotland.

e.surv is part of the LSL Property Services group of companies, which includes household names YOUR MOVE and Reeds Rains, as well as the mortgage broker network, First Complete. We work with lenders, intermediaries, social housing entities and estate agents, in addition to private customers.

e.surv is one of the UK's largest valuation providers, directly employing over 600 residential surveyors across the UK, supported by a network of consultant valuers. The business is one of the largest distributors and managers of valuation instructions in the UK and is appointed as Panel Manager for more than 20 mortgage lenders and other entities with interests in residential property. The business also provides a number of private survey products direct to the home-buying public.

## Why do we process your data?

Our business receives instructions from major Banks, Building Societies and financial institutions (lenders) to inspect and value properties for residential mortgage lending purposes. Where this is the case, we do not have a direct relationship with the end consumer (i.e. the Bank, Building Society or financial institution's customer – the mortgage applicant).

Our business however also receives instructions to value and or survey properties for residential purposes from members of the general public. Where this is the case, the member of public is our direct customer.

Within the scope of the data protection legislation, e.surv is a “Data Processor” where it receives instructions from a lender client to value and or survey properties. This is because the customer relationship is directly between a lender and its customer, not e.surv. In this regard, the lender is defining the purpose for which and manner in which its customer’s personal data are or are to be processed and e.surv processes the data in accordance with the lender’s instructions.

Likewise, e.surv is “Data Controller” as defined in data protection legislation where it has a direct relationship with a member of the public. We receive instructions to value and survey properties from the general public and therefore it is e.surv who is defining the purpose for which and manner in which the personal data is or is to be processed.

With regard to its employees, e.surv is a “Data Controller” as it is defining the purpose and manner of the processing of the data being given to it by its employees.

To support our processing activities we use recognised and established UK suppliers, a list of these suppliers and what we use them for is available on request. However, the personal data supplied in the course of our duty as a Chartered Surveying Firm is not used by e.surv or any of our suppliers for marketing purposes or consumer profiling or selection.

## **What lawful basis do we have to process your personal data?**

e.surv has identified that it has a contractual and legitimate interest basis for processing personal data. This is because it has either, a contract between a lender client and itself allowing it to process personal data in the provision of its service for the lender client, or agreed terms and conditions where you as a consumer have asked e.surv to provide you with a residential Mortgage Valuation or Survey.

## **Use of personal data**

e.surv will only process the personal data it receives and collects if it has a lawful basis for processing it (see section 10 below, a requirement under article 6 of the GDPR). In all cases e.surv’s lawful basis for processing personal data is that it has either a legal or contractual obligation with its employees, clients and customers which makes it necessary for the processing of personal data to take place.

## **What Information is being collected?**

We may collect personal information from you in connection with your use of the Site or when you call us to enquire about our services, including personal information such as:

- your name and contact information, including your email address and telephone number when completing our online form or making a phone enquiry;

- information provided by you to assist us with your enquiry when completing our online form or making a phone enquiry, such as your property address and property type details; and
- cookie data which relates to your use of the Site.
- We may also collect additional information from you if you decide to use our valuation or surveying products or services or if we contact you regarding your enquiry, including personal information such as:
  - the first line of your address and property postcode;
  - the type of property i.e. house, flat, bungalow;
  - when the property was built;
  - how many bedrooms the property has;
  - the estimated value of the property; and
- your card payment details including the name of the cardholder if you are paying for a valuation or survey. Please note that we do not store these details as we use a card payment processor which encrypts these details at the point of transmission. Telephone calls are recorded for training and monitoring purposes, however recording stops at the point where you are required to provide card payment details.

### **What information is collected if you are a job applicant?**

We may also collect personal information from you (and from others such as managers involved in the recruitment process and those supplying references and verification information) if you decide to apply for a job with us including:

- your contact details such as your name, address, previous addresses, telephone number and email address;
- information to identify you including photographic identification, your passport and or driving licence details and signature;
- information about your suitability to work for us including references, notes from interviews, records of assessments and eligibility to work in the UK (including any work visas);
- the results of a credit reference check, financial sanction check and a basic disclosure & barring criminal record check relating to unspent convictions;
- information about your skills and experience including your CV, application form, records of qualifications and training;
- information related to the outcome of your application including the decision and, if you are successful, details of our offer of employment to you; and
- certain sensitive or special category information including medical information where necessary to comply with legal obligations connected with employment.

## What do we do with the Information we receive?

Your information will be used by us in connection with the following purposes:

Providing you with Valuation and Surveying Services (see “Services”):

- to allow us to provide you with the valuation and surveying products and services which you have asked us to provide;
- to better understand your requirements and provide you with services specific to your needs;
- to keep our client records up to date; and
- to improve our services.

Responding to your queries:

- to help answer any questions which you have asked one of our surveyors or staff members; and
- to provide you with a quote for our services.
- Improving our Site:
- to analyse cookie and website usage data to keep improving the Site and search functionality; and
- to allow us to customise the content which is presented to you based on your likely interests.

Legal and Regulatory Obligations:

- to comply with applicable laws where we are obliged to retain and/or disclose certain information;
- to investigate or address claims or complaints relating to your use of our services; and
- for internal and external auditing purposes.

Recruitment where you are a Job Applicant:

- to assess your suitability to work for us including short listing, assessments and interviews;
- to conduct pre-employment checks including verification of your identity, checking your legal right to work and obtaining references;
- to conduct a pre-employment credit reference check, financial sanction check and a check in relation to unspent criminal convictions in order to prevent crime and other unlawful acts and to protect the business and customers from the risk of dishonesty, malpractice or improper conduct;
- to compare you with other applicants and make a decision whether to offer you employment;

- to consider any reasonable adjustments either for the recruitment process or if you were to commence employment with us in the event that you have a disability;
- to make a job offer and provide a contract of employment;
- to prepare to bring you on board as an employee where you accept an offer of employment from us. In this case we will continue to use some of the information gathered during recruitment for the purpose of your employment and will transfer some of this to our employment systems and files;
- to contact you if you are not successful should another potentially suitable vacancy arise during the six months following the completion of the recruitment process for the role you applied for; and
- to deal with any query or request for feedback received in relation to our recruitment decision.

Where you are a job applicant we use your information either where necessary to comply with legal obligations (for example right to work checks or to carry out obligations under employment law in the case of medical information); to take steps to consider you as an applicant prior to being able to enter into an employment contract with you; and where we consider it is necessary for the purpose of our legitimate interests listed above. We also use your information with your consent in relation to checks carried out in relation to unspent criminal convictions.

In the event that you were not satisfied with our recruitment decision and brought a legal challenge we would use your information to defend the legal claim.

Other:

- to transfer information to any entity which may acquire rights in us.

## Data Retention

The personal information that you provide will be retained by us in accordance with applicable laws and our internal Retention Policy. However, we will take reasonable steps to destroy or de-identify personal information we hold if it is no longer needed for the purposes set out above. We will only hold your personal information on our systems for up to 15 years in accordance with our regulators guidelines (The Royal Institution of Chartered Surveyors) and for the relevant purposes for which it was collected. A copy of our Retention Policy is available on request.

Where you are a job applicant we will keep the information we receive about you throughout the recruitment process and for a period of six months after completion of the process. If you have not commenced employment with us we will then remove your information (or de-identify it) where we have not received any query or challenge which is outstanding. We will retain it if needed to deal with any outstanding query or challenge to

the process. Where you become our employee we will keep your information where relevant to your employment and this will become part of your employment records.

## Disclosure of Information

The information you provide to us will be held on our computers in the United Kingdom and may be accessed by or given to our staff to fulfil their duties in the provision of the service you have requested from us.

We may also disclose your information to the third parties listed below for the following purposes:

- entities who may or do acquire any rights in us for the purpose of a business sale or reorganisation;
- our advisers (staff), for the purpose of assisting us to better manage, support or develop our business and comply with our legal and regulatory obligations;
- third parties as necessary in the event of a professional indemnity claim or dispute relating to the use of our services;
- service providers such as other surveying firms and other surveyors if we are instructed to use them as part of a contract with a lender client who need to know the information in order to provide us or you with a product or service;
- law enforcement bodies and/or other regulatory entities in order to comply with any legal obligation or court order;
- third parties we work with as part of providing our services, including (but not limited to) IT hardware and software providers and payment processing providers. We expect such third parties to attest to process any data disclosed to them in accordance with applicable law, including with respect to data confidentiality and security and have appropriate services agreements in place with each. Payments for services are processed securely and in compliance with the Payment Card Industry, Data Security Standard (PCI DSS); and
- where you are a job applicant we use a recruitment platform provided by ICIMS (a data processor engaged by us to support our recruitment); we work with Disclosure Scotland to carry our criminal record checks, Experian to carry out credit referencing and Veriphy to complete identity verification. We disclose information to the referees you have provided to obtain the relevant references.

These parties are to be located in the UK.

## Links to third party sites

The Site may contain links to other sites. e.surv is not responsible for and accepts no liability for the content of other sites which are not under its strict control, in particular, we are not responsible for the protection and privacy of any information which you provide whilst visiting other websites and such sites are not governed by our Privacy Notice.

## Data privacy and security

e.surv is certified to the globally recognised standard for Information Security, ISO 27001:2013 and is externally assessed for conformance to this standard every six months by the British Standards Institute. Certification to this standard ensures that our business regularly assesses external and internal threats to the safety of information and operates with the relevant technical and operational security controls to keep data safe.

Likewise, e.surv is also certified to ISO 9001:2015, the globally recognised standard for Quality Management, which ensures that adequate risk management practices are in place to identify and treat emerging risks and check that procedures are operating effectively. Continued assessment of conformance to this standard is carried out by the British Standards Institute every twelve months.

## Data Protection Information

You can obtain further information about data protection laws by visiting the Information Commissioner's website at <https://www.gov.uk/data-protection/the-data-protection-act>.

## Your Rights

Under relevant data protection legislation (the General Data Protection Regulation), individuals have rights over the processing, retention and deletion of their Personal Data.

You have the right to request copies of the personal data we hold and control relating to you and details of how we use that information. Upon request and where relevant and applicable to the General Data Protection Regulation, e.surv will comply with your request within 30 days of your request. You also have the right, if you think any of the personal information we hold about you is inaccurate to request that it is corrected or erased. You can request an electronic copy of your personal data be sent to you, or to another organisation should you wish. You also have a right to require us to stop processing your personal information and/or to withdraw your agreement to processing based on 'consent', unless we have a legal justification for doing so.

## Contact

If you have any questions or comments about our Privacy Notice or if you wish to exercise your right to access, correction or erasure or your right to ask us to stop processing your information mentioned you can contact us either by telephone, email or in writing whichever you prefer.

- 01536 534000
- E-mail: [Data.protection@esurv.co.uk](mailto:Data.protection@esurv.co.uk)
- Post: e.surv Data Protection Officer, Lahnstein House, Gold Street, Kettering, Northants, NN16 8AP



Data Protection Officer:

e.surv has appointed its own data protection representative, Paul RayCollins. Paul is a member of the e.surv Board of Directors, reporting directly to the e.surv Managing Director and has the role of Director of Governance at e.surv.

For all e.surv related data protection matters, Paul can be contacted by writing to:

The Risk & Governance Department  
e.surv Chartered Surveyors  
Lahnstein House  
Gold Street  
Kettering  
Northants, NN16 8AP

### **What if my personal data is compromised?**

e.surv has an obligation to inform you within 72 hours of becoming aware of a data breach that is likely to result in a risk to your data and rights and freedom, e.surv will also report such breach to the Information Commissioners Office (ICO) or its lender clients having investigated fully the suspected breach.

If the breach is likely to result in a high risk to the rights and freedoms of individuals, e.surv will notify you if your personal data is NOT encrypted or NOT unintelligible.

### **Complaints**

If you have any concerns or complaints as to how we have handled your personal data you may lodge a complaint with the UK's data protection regulator, the ICO, who can be contacted through their website at <https://ico.org.uk/global/contact-us/> or by writing to Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.