

Project Team

Please note, this is *not* a stand-alone document. To understand this Privacy Notice, and how we use your personal data when you interact with us, this document should be read alongside CEI's full Privacy Policy here: <https://www.ceiglobal.org/privacy-policy>

1. How personal information is obtained

We collect personal information from Project Team members from yourself and from a variety of indirect locations (i.e. we don't always initially obtain your personal data from yourself).

We collect personal information from initial applications to CEI where CEI has advertised for applications from researchers and research organisations to conduct CEI supported and/or funded research projects or other related projects. There are a variety of documents with personal data capture fields in which Project Team applicants must complete as part of the application and subsequent approval processes.

Once an application is successful, we will collect further Project Team member personal information from the individuals named in the initial application materials and communications, this is most likely collected over email. There may be times CEI captures further personal information of Project Team members from publicly available websites and social media platforms.

Throughout the duration of a project there may be a further capture of personal information via documentation submitted, Certification Services, UK Disclosure & Barring Service (DBS) (if applicable), and any subsequent requirements by external websites and software which require further personal information as part of their functional processes. CEI may or may not be responsible for collecting your personal information for requirements throughout a given project although it is likely CEI will collect this personal information so it may assist any required processes.

CEI also retains a list of sector relevant stakeholders which has been created from publicly available locations, websites and social media, and made up of stakeholders CEI has interacted with on a previous project or on an individual basis with a current CEI employee.

Individual CEI employees may be maintaining a professional relationship with you as a relevant industry stakeholder where there has been a previously established relationship. CEI will always confirm you are comfortable with your personal information being processed by CEI (where there is a previous relationship with a CEI employee) where they have made contact with you directly – in this scenario CEI has collected your personal indirectly via its employee.

You may volunteer personal information to CEI which may or may not be related to a project in which you are involved which CEI will record for awareness of future opportunities to work with you. Other ways CEI will collect your personal information include:

- From yourself within online/telephone interviews
- From yourself within online workshop or focus group interviews
- From yourself via an online survey we have sent you or you have voluntarily answered
- From yourself when you communicate directly with us
- From your place of work to make initial contact with you

2. Types of personal information obtained

As an individual (data subject) working on a project in collaboration with CEI or on a project that is funded by CEI we will typically collect the following categories of your personal data (we work to only collect the minimum amount outlined):

- Name(s), Email Address, Phone number
- Job Title, occupation, place of work, employer
- Your CV, qualifications and relevant experience including any previously published work
- Information held in past successful or unsuccessful funding applications
- Information held on documentation created within a past project in which you were a member of the Project Team
- Information captured in emails, surveys and communications
- Information recorded in interviews we have with you

This information is also relevant to employees of organisations acting within the framework of being part of CEI's 'Panel of Evaluators' (a set of organisations CEI partner with to conduct projects) and 'Advisory Groups' (groups of industry specific relevant stakeholders who advise CEI in various capacities on projects CEI are undertaking – either directly related to a project or informing the development of a project).

3. Why we collect your information and what we use it for

Within a Project Team, which includes all individuals (data subjects) involved in the life cycle of a project from idea inception to funding, conducting the project, writing, and printing the report through to completion and data deletion, we collect personal information for different purposes throughout.

There are members of the Project Team that will be involved in activities around a project but not involved in the delivery or activity of the project itself. These Project Team member's personal information will be used for the following reasons:

- To interact for the development of a project idea, funding application and acceptance or rejection
- To maintain legal and ethical compliance measures for a project
- To communicate between stakeholders to assist and support the project technically, organisationally, or contractually
- To liaise for the creation of documentation and reports including but not limited to any interim or final project reports as required
- For setting up and conducting of individual or group conversations which are held digitally or in person
- To make contact with individuals to address any challenges faced
- To identify you in past project documentation if helpful to a live project

Where you are part of the Project Team that will deliver the aims of the project and are involved in conducting the activities associated in the delivery of a project, we use your personal information for the following reasons:

- To review your applicability for being part of the Project Team that will deliver a project
- To set up meetings, events, and communication activities relevant to the work within the project
- To send you information and set up desired and possibly automated lines of communication to yourself for the duration of the project
- To identify yourself as a relevant project stakeholder for project or research participants which may mean we share your direct contact details to relevant participants for the purpose of the smooth running of a project or to address any challenges faced
- Where relevant and agreed, to make you identifiable on published documentation so you receive the required accreditation for the work you have conducted
- To add credibility to project documents where you are a recognised authority in a particular field or subject which may in turn attract investment or good will for participation in the project
- If relevant to the project, to conduct interviews, send and receive surveys and set up the ability to gain access to datasets in external locations and databases

- To set up visits and access requirements to organisations, buildings or protected individuals
- To run a Disclosure and Barring Service (DBS) application and processes if required for the project and share the outcome as required
- To send or receive instructions from you in the pursuit of the objective of the project
- To identify you in past project documentation if helpful to a live project

4. Lawful Basis for Processing

In the lifecycle of a project one the following lawful basis for processing your personal information will apply and is dependent on how you interact with us:

- **Contract:** Processing your personal information in accordance with a contract we have with you or the organisation you work for.
- **Legal:** Complying with applicable law with regard to personal data necessary to satisfy our legal and regulatory obligations, including with regard to public health and workplace safety, entitlement to work and when applicable to conduct security checks for a project.
- **Legitimate Interest:** In the processing of your personal information in relation to a project application, to set up project related activities and in the overall organisational, monitoring and management activities during a project. This includes moving your data to an internal stakeholder list for possible future collaboration and notifications.

5. How Long we store your personal information

We will only keep personal information for as long as it is needed to fulfil the purpose for which it was collected. Where it has been indicated to us that an individual in a Project Team is no longer relevant, has changed role or organisation, or has requested to be forgotten, unless there is no other legal reason for retaining the personal information, we will update or delete the personal information as required.

Personal information of Project Team members may be moved into Communications activities lists and therefore retained longer than may be anticipated for an individual project – this is within our legitimate interest to do so, and all Project Team members have the ability to opt-out of such further communications at any time.