

## Research Stakeholders

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. What personal information we collect

We work to review industry sectors and engage with sector stakeholders, decision makers, panels, advisory groups, and people directly employed in the sector we are commissioned to review. From this work we discover, review, and generate ideas for potential programmes of work we are funded to undertake or commission on behalf of another organisation. These include the creation of advisory groups, pre-research study guides and project initiation documentation. To achieve this, we will typically collect and process the following personal information:

- Name, Email Address, Phone number
- Job Title, occupation, place of work, employer
- Your CV, qualifications and relevant experience including any previously published work
- Information captured in emails, surveys, and communications
- Information recorded in interviews we have with you
- Personal information published by and associated with an establishment or organisation undertaking a programme of work that might benefit from the type of project or research we fund
- Personal information submitted by an organisation to us
- Personal information we require to process communications and applications
- Personal information held within previous academic research journals and papers
- Personal information made publicly available on websites and social media
- Personal information you provide to us whilst we are working with you

Some or all of the list above may be collected when you are:

- Engaging with us during our reviews of a particular sector on behalf of a client ("Sector Stakeholder")
- Working with us to review potential new project or areas of research and/or helping us to make decisions on whom to allocate resources ("Sector Stakeholder")
- Working on, or part of, a programme of work we think could benefit from a project or piece of research ("Delivery Partner")
- Part of an organisation applying to have a project or piece of research conducted and/or funded by us based upon a programme of work you have conceived, or are involved with, or wish to be involved with ("Delivery Partner")
- Part of an organisation applying to win a research based contract from us or with us, or are part of an organisation that has commissioned us, with or without other partners, to undertake a project or piece of research according to a brief we have written in a bid document or other relevant documentation ("Evaluator")

Where you are working on a programme of work that is to benefit from a project or piece of research, we refer to the organisation(s) delivering the programme of work as a 'Delivery Partner'. A Delivery Partner organisation may also receive funding from us or from the same organisation acting as our funder to continue the programme of work. A Delivery Partner organisation may also be introducing a new programme of work as part of a project or piece of research so that we might conduct a project or piece of research based on the new programme of work. You may be referred to as an 'Delivery Partner' further through this document

Where you are working within an organisation expressing an interest or applying to undertake a project or piece of research with us or on our behalf, we refer to the organisation as an 'Evaluator'.

You may also be part of an advisory group, stakeholder panel, set of sectoral ambassadors, or an industry expert or stakeholder ('Sector Stakeholder') providing us with opinion and/or further information as part of our work to conduct a project, and discover and review new projects and their allocation.

We will never process any personal information which you would not expect us to process when we are working with you.

## 2. Why we collect your information and what we use it for

There are many uses of personal information in our work for Discovery, Review and Allocation. The following uses of your information, unless specified further below are relevant to all individuals involved:

- To identify you as a relevant individual
- To invite you to meet with us or attend an event we are holding either virtually or in person
- To invite you to attend an industry event with us with the option of liaising with you to speak at an event either with us or on our behalf (this may also include speaking to the media for the purpose of publication including print, radio, and television)
- To invite you to participate in a survey, panel, or poll we are conducting
- To request and capture your opinions which will be used to inform our decisions in this area of work or within a commissioned piece of work
- To discuss thoughts and ideas around sectoral challenges and initiatives
- To identify and review programmes of work undertaken in a sector we have been commissioned to review
- To allocate you to a project or piece of research where you will become a member of the Project Team
- To record a podcast, webinar and/or video with us for purposes of creating promotional or sectoral awareness content which we may publish for public consumption
- If applicable, for reference within an academic paper, journal or sectoral publication including print, radio, or television
- To monitor your level of engagement with us
- If applicable, to book and arrange transport and accommodation for you
- To inform and discuss with you any intentions for archiving research generated data for future use
- To associate you to a piece of work you have conducted
- To interact about and for the development of a project idea, a call for projects, evaluators and research partners, an Expression of Interest (EOI) submission, an invitation to tender (ITT) document or submission, and/or a funding application or funding process
- To maintain legal and ethical compliance measures

### Sector Stakeholders

- To request your permission for involvement in an advisory group, committee, or industry ambassador programme we have created or been made aware of.
- To gain information from you as part of a project we have been commissioned to undertake.
- Sharing of your personal information for the encouragement of networking, idea generation and healthy debate, with other individuals in the same Sector Stakeholder groups as yourself.
- If applicable, to pay you for your time or services.

### Delivery Partner

- To review applicability and eligibility for the implementation of a programme of work we have proposed that will be part of a project or piece of research we have been commissioned/funded to conduct

- To review applicability and eligibility of a programme of work already implemented (without our influence) for a project or piece of research we have been commissioned/funded to conduct
- To make decisions regarding allocation of resources, applicable evaluators, funding and timing for a project or piece of research based on information you have provided
- To make our funder aware of a project and where applicable the individuals involved in the project

#### Evaluator

- To make decisions on your eligibility and applicability as an individual, collective or organisation, to conduct a project or a piece of research work in respect of a brief either a funder or us have written
- For the review of documents, you have submitted to us

### 3. Collecting your personal information

There are many ways we collect your personal information during our Discovery, Review and Allocation work. These include:

- From publicly available sources including websites, social media, broadcast media, publications in print, radio and television, and academic or scientific publications
- From sector related referrals (employees, Sector Stakeholders, Delivery Partners, Evaluators, current and past Project Team members, local or central government sources, our funders, our board of directors, sector related charities, schools, social workers, Higher Education Providers, Professors, researchers, data scientists, academics)
- From yourself within online/telephone meetings and/or interviews\*
- From yourself within online or in person forums, panels, workshops, focus groups or sectoral relevant meetings or interviews\*
- From yourself via online polling requests or surveys we have sent you which you have answered
- From yourself when you communicate directly with us
- From your place of work to make initial contact with you
- Within documentation you or a relevant organisation has submitted or provided to us

\*Please note that CEI often use Zoom to facilitate online interviews. Visit [Zoom's website](#) for more information about how they use your data.

### 4. Our lawful basis for using your data

Most frequently we will process your personal information on the basis of our legitimate interest as a Data Controller within our work for the benefit of society.

There may be occasions where we have entered into a contract with you and therefore the lawful basis shall be upon the obligations of a contract in which you have agreed.

There may also be occasions where our funder(s) shall instruct us in our work and provide a separate lawful basis where they are the Data Controller for a project in which we are engaged. We shall notify you separately if this is the case.

### 5. How long we keep your data

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 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. We review all lists at least on an annual basis.

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

## **6. Last update to this Privacy Notice**

This Privacy Notice was last updated in November 2022.