

## Locale Fair Processing Notice to Portal Registrants

### 1. Important information

#### Purpose of this notice

This fair processing notice aims to give you information about the personal data that Locale's Website/Portal can collect and process about you when you sign up as a user. It sets out the scope, nature, and purpose of processing by the Data Controller and Locale, the lawful basis upon which we rely, the duration of the processing and the types of Personal Data and categories of Data Subject. This is based on a typical portal set-up, but all of these elements will be determined by each of our Customers who are usually the Data Controller. We explain this more fully below.

#### Definitions

In this notice the following terms have the meaning given below:

**Data Protection Legislation:** the UK Data Protection Legislation and (for so long as and to the extent that the law of the European Union has legal effect in the UK) the General Data Protection Regulation ((EU) 2016/679) and any other directly applicable European Union regulation relating to privacy.

**Locale:** Locale Limited incorporated and registered in England and Wales with company number 05688298 whose registered office is at Prama House, 267 Banbury Road, Summertown, OX2 7HT. 'Locale' also refers to companies in The Locale Group of companies, including: Locale Limited, Locale Life Limited, Locale Look Limited and The Locale Group.

**UK Data Protection Legislation:** any data protection legislation in force in the UK including the Data Protection Act 2018, the UK GDPR, or any successor legislation.

**Website/Portal:** the website through which Locale makes its software available to you for the purposes of engaging with your property management company, property developer whether as a resident, tenant, or employee of those companies.

We will be referred to collectively as "Locale", "we", "us" or "our" in this notice.

You will be referred to as "the user", "the registrant" or "you".

Our customers will be referred to as 'our customers', 'the property developers', or 'the property management company'.

If you have any questions about this privacy notice you can contact Locale at the address above or using the following details: Marta Gonçalves do Couto, Data Protection Manager, [GDPR@locale.co.uk](mailto:GDPR@locale.co.uk)

The terms **Data Controller**, **Data Processor**, **Data Subject** and **Personal Data** have the meaning given to them in the UK Data Protection Legislation.

## **Our Role as a Data Processor**

For the purposes of the Data Protection Legislation, Locale is a Data Processor, which means we process personal data on behalf of our customers. Our customers (the property management company or the property developers) remain the Data Controller for personal data processed via the portal we provide to you. They trust us to process data about you - their tenants or residents and other visitors to their site. We can only process personal data in accordance with their instructions and their purposes.

## **Who is the Data Controller?**

Commonly, the data controller would be the organisation that engaged Locale to provide this portal to their employees, residents, and tenants. However, on occasion the Building Owner will be the Data Controller and they engage a Managing Agent who acts on their behalf in selecting appropriate services for the building; the Managing Agent then engages Locale to provide the Portal services. To confirm which case applies to you, please contact your building.

The data controller determined the purposes for which your personal data will be processed, and we enable this to take place through our portal software for the duration of our contract with them, and an agreed period after contract expiry.

## **You are the Data Subject**

If you see the term 'data subject' being used, we are referring to you, the portal user, whose data we are processing in order to enable you to engage with the property developers or the property management company, receive information and offers from them, as well as access services available to you as a resident, tenant, or employee of that building.

If our customers sign up for certain "partner" services we offer, your personal data will be shared with a sub-Data Processor, who The Locale Group have partnered with to offer further additional services. We have taken our responsibility to select a sub-Data Processor who complies with all relevant data protection legislation seriously and have undertaken appropriate checks to ensure that the personal data processed will remain secure. Locale can only process the personal data in accordance with instructions given by our Customers (the property developers or property management company) and for the purposes identified by them. We will notify you if the services you choose involve personal data being shared with partner companies.

You may have been pre-registered to your building portal with personal information provided by your building teams. If this is the case, you will have received an email notification inviting you to activate your portal account. If you choose not to register, your account will remain inactive on the portal. Building teams are able to access the first names, surnames and email addresses of users they have registered in this way via selected modules to facilitate their FM processes and auditing. You can ask to remove your pre-registered details from the portal, via your building teams, at any time

- Changes to the Fair Processing Notice

This version was last updated in February 2024. Historic versions can be obtained by contacting us.

- Third-party links

Locale's Website/Portal may include links to third-party Website/Portals, plug-ins, and applications. Clicking on those links or enabling those connections may allow third parties to collect or share data about you. We do not control these third-party Website/Portals and are not responsible for their privacy statements.

## 2. Processing

### Scope

We will only process personal data about Data Subjects on our customers' written instructions to do so unless we are required to otherwise process that personal data as a result of any law of the United Kingdom, of the European Union or other member state of the European Union or any other law that applies in the United Kingdom to do so.

### Nature

Further details of the types of personal data our Website/Portal collects, and processes is set out below.

Our Website/Portal does not collect any **Special Categories of Personal Data** about Data Subjects (this includes details about their race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, trade union membership, information about their health and genetic and biometric data). Nor does our Website/Portal collect any information about criminal convictions and offences.

### Lawful Bases

Under Data Protection Legislation, we are only permitted to use your personal data where our customers have determined an appropriate lawful basis for doing so. Our customers rely on the following lawful bases for processing your data:

- Where the processing is necessary to carry out activities that are in our customers' legitimate interest, and provided that these interests are not overridden by your own privacy rights;
- Where the processing is necessary for our customers to perform a contract, they have entered into with you;
- Where the processing is necessary for our customers to comply with a legal obligation; or
- Where we have obtained your prior consent, provided you have given us your clear, unambiguous, and informed consent.

### Purpose

We have set out below a description of the ways our customers may use the personal data they have collected and stored in our Website/Portal. This is based on a typical customer and may vary based on their individual requirements and instructions to us. The information below is likely

to relate to you: their tenants, residents, employees, and also any visitors to their sites. A more detailed list is available at the end of this notice.

<b>Purpose/Activity</b>	<b>Type of data</b>
To register a new user within our Website/Portal	(a) Identity
	(b) Contact
To process and deliver services to users including:	(a) Identity
(a) Manage payments, fees and charges	(b) Contact
	(c) Financial
	(d) Transaction
	(e) Marketing and Communications
To manage their relationship with users which will include:	(a) Identity
(a) Notifying you about changes to your terms or privacy policy	(b) Contact
	(c) Profile
(b) Asking you to leave a review or take a survey	(d) Marketing and Communications
To enable users to partake in a prize draw, competition or complete a survey	(a) Identity
	(b) Contact
	(c) Profile
	(d) Usage
	(e) Marketing and Communications
To deliver relevant Website/Portal content and advertisements to you and measure or understand the effectiveness of the advertising being served to you	(a) Identity
	(b) Contact
	(c) Profile
	(d) Usage
	(e) Marketing and Communications
	(f) Technical
To make suggestions and recommendations to users about goods or services that may be of interest to you	(a) Identity
	(b) Contact
	(c) Technical

(d) Usage

(e) Profile

In addition, Locale may use your data collected via the Website/Portal for the following purposes, as agreed within the contract with our customers:

Purpose/Activity	Type of data
To administer and protect our business and this Website/Portal (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of data)	(a) Identity (b) Contact (c) Technical
To use data analytics to improve our Website/Portal, products/services, marketing, customer relationships and experiences of our customers and their users.	(a) Technical (b) Usage
To support our Customers in collecting and recovering money owed to them.	(a) Identity (b) Contact (c) Financial (d) Transaction

## Duration

We may process the personal data of Data Subjects for the duration of our agreement with our customer and thereafter until such time as

- we receive their written instructions following the termination of our agreement with them to delete or return that personal data to them.
- they require us to delete that personal data in accordance with their data retention policy which they send to us in writing; or
- where they have not given us their written instructions or sent us their data retention policy, we will retain the personal data of Data Subjects held in our Website/Portal in accordance with our Data Retention Policy, a copy of which is available on request.

In each case we will delete the personal data we store when we are required to delete it unless we are required to store that personal data as a result of any law of the United Kingdom, of the European Union or other member state of the European Union or any other law that applies in the United Kingdom.

## Types of Personal Data our Website/Portal can collect

Our customers may use our Website/Portal to collect, use, store and transfer different kinds of personal data about you. We group them together as follows:

- **Identity Data** includes first name, maiden name, last name, username or similar identifier, marital status, title, date of birth and gender.
- **Contact Data** includes billing address, delivery address, email address and telephone numbers.
- **Technical Data** includes internet protocol (IP) address, your login data, browser type and version, time zone setting and location, browser plug-in types and versions, operating system and platform and other technology on the devices you use to access our Website/Portal.
- **Profile Data** includes your username and password, requests to use resources made by you, your interests, preferences, feedback, and survey responses.
- **Usage Data** includes information about how you use our Website/Portal.
- **Marketing and Communications Data** includes your preferences in receiving marketing from our Customer (the property developer or property management company) or any relevant third parties, and your communication preferences

Locale also collects, uses, and shares **Aggregated Data** such as statistical or demographic data for any purpose. Aggregated Data may be derived from your personal data but is not considered personal data in law as this data does **not** directly or indirectly reveal your identity. For example, we may aggregate all Data Subjects' Usage Data to calculate the percentage of users accessing a specific Website/Portal feature.

## Categories of Data Subject

Our customers may use our Website/Portal to collect, use, store and otherwise process personal data about any category of Data Subject whom they ask us to set up within the Website/Portal. Typically, our Website/Portal is used to collect and process personal data about the following categories of Data Subject:

- their employees, agents, and independent contractors.
- owners of the freehold or leasehold of the property they manage through our Website/Portal (**Property**);
- investors in any Property.
- employees, agents, independent contractors, members or directors of any company or other corporate entity which owns a Property.
- lenders to the owner of a Property (**Lenders**);
- employees, agents, independent contractors, members, or directors of Lenders.
- tenants or licensees of any commercial, industrial or residential unit with any Property (**Tenants**);
- employees, agents, independent contractors, members, or directors of Tenants; and
- visitors to any Property.

## Transfers of Personal Data

As per standard on our daily business operations, your personal data will not be transferred outside of the United Kingdom or the European Economic Area (EEA). However, on occasion, we may share your data with employees who may be temporarily based in third countries (countries that are not part of the UK or European Economic Area - the "EEA" consists of all EU member states, plus Norway, Iceland, and Liechtenstein).

The data they access remains in the UK, and in addition to the above, we ask them to adhere to our data protection policies as part of their work with us.

### 3. Your Rights

You have a number of rights in relation to your personal data which you can exercise against the Data Controller, including the right to:

- Be informed about how your personal data is used
- Obtain access to your personal data that is held
- Request that your personal data is corrected if you believe it is incorrect, incomplete, or inaccurate
- Request that your personal data is erased, in certain circumstances
- Ask to restrict the data processing activities, in certain circumstances
- Object to the processing of your personal data, and the Data Controller will carry out an assessment to determine whether they have an overriding legitimate ground which enables the processing of your personal data to continue
- Not be subject to wholly automated decisions which could have a significant effect on you

If you would like to exercise any of your rights in relation to the Website/Portal, please contact Marta Gonçalves do Couto, Data Protection Manager at [GDPR@locale.co.uk](mailto:GDPR@locale.co.uk). Locale will engage with the relevant Data Controller.

Please note that Locale and our customers will keep a record of the fact that you have made a request to exercise your rights and our response to your request in order to demonstrate compliance with their data protection obligations and so that they can handle any queries, complaints or claims in relation to your request.

You will not normally have to pay a fee to access your personal data or exercise any of your other rights. However, our customer may charge a reasonable fee where your request is clearly unfounded, repetitive, or excessive, or even refuse to comply with your request in such circumstances.

If you have an unresolved issue, then you have the right to complain to the supervisory authority. In the UK, this is the Information Commissioner's Office (ICO). You can contact the ICO via their website [www.ico.org.uk](http://www.ico.org.uk).

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