

Home Energy Advice Team (HEAT) Services Privacy Notice

The Wise Group delivers a range of energy advice and advocacy services aimed at reducing fuel poverty. Our Home Energy Advice Team (HEAT) employs a team of qualified Energy Advisers to provide practical advice about energy efficiency.

Our service aims to: help you use your heating system; help you to use energy more efficiently; identify and address challenges in relation to energy usage and bills; identify and access other financial and non-financial support and access other relevant services.

Who we are

The Wise Group is the data controller. This means that we are responsible for determining the purposes and means of this personal data processing. We need to process information about you to provide energy advice and advocacy support. We will do this in accordance with [Regulation \(EU\) 2016/679](#) (General Data Protection Regulation – GDPR) and [Data Protection Act 2018](#) (DPA18).

Personal data

Personal data 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 collect and process the following information:

- Your personal details (e.g. name, address, contact details, date of birth).
- Information about personal circumstances including some financial information (e.g. employment status, whether you live in or in fear of fuel poverty, income/expenditure, arrears).
- Information about your household, who lives there and how much energy you use (e.g. property type, occupancy details, heating systems, energy suppliers, meter readings).
- Details of the service we provide to you. This can include any financial support, any savings achieved, specific activities undertaken and your perception of the support provided.

- We may collect special categories of personal data about you, including information about health and racial / ethnic origin. We may also collect special categories of personal data about members of your household, including health information.
- Please note - when we collect information about other people in your household, we will not record any information that could directly identify them.

Purpose of personal data processing

We use personal information to assess whether you are eligible to access our services and deliver the service to you.

We may use your personal data to generate statistics and case studies to evaluate the impact of our service, market the service or share with organisations that provide funding for our services. Your personal data will not be disclosed unless you provide us with consent to include identifiable information about you.

In evaluating our services we may contact you to understand your perception of the service, your level of satisfaction and if you benefited from engaging with us. If we do contact you for this purpose, you can refuse to participate in this activity.

We may use your personal data to share with other Wise Group services and departments that can provide additional support to help you meet your goals or improve your personal circumstances.

We would like to contact you about other services which may be of interest to you in the future. You will be asked for your explicit consent for this and you are under no obligation to agree to this.

The lawful grounds for the processing

The lawful grounds for processing your data are:

- *Consent* – if you agree to the specific data processing activities described above you will be asked to provide your consent in

writing. Your consent is freely given, but we may not be able to deliver the service to you without it. You have the right to withdraw your consent at any time. The withdrawal of your consent will not affect the lawfulness of processing based on consent before its withdrawal. If you withdraw your consent, we may not be able to provide certain services to you. We will advise you if this is the case at the time you withdraw your consent.

- **Legitimate Interests** – We may rely on the Legitimate Interests of the Wise Group (or those of a third party) to use your personal data to inform you of additional support services available to you through the Wise Group to enhance the support provided to you. Legitimate Interest means our interest in conducting and managing our activities and projects to enable us to give you the best service and experience. We consider and examine any potential impact on you and your rights before we process your personal data for our legitimate interests to ensure that those interests do not override your interests and fundamental rights. You can obtain further information about how we assess our legitimate interests against any potential impact on you in respect of specific activities by contacting us.

How do we collect this data?

We collect information directly from you.

How long do we keep your data?

The information collected will be kept until the completion of the programme, and for the duration required for any legal and audit purposes. More specifically, we will retain your data for a period of 7 years from the end of the funding period in order to demonstrate the support provided to you and how the funding has been spent. Following this period, we will completely and irreversibly erase your personal data, unless we are required by law to do otherwise.

Sharing your personal data

We will share your personal data with third parties where required by law, where it is necessary to administer our relationship with you or where we have another relevant, carefully assessed legitimate interest in doing so. Personal information held by the Wise Group may be shared with governmental organisations and departments to enable them to exercise their statutory duties as required by law.

We will not disclose your personal information to third parties unless there is a lawful ground for this. We will not share your personal information for marketing purposes unless you consent to this processing.

The third parties your information may be shared with include:

- Organisations that provide funding to deliver the service for monitoring and audit purposes.
- Energy suppliers for the purpose of understanding, negotiating or reducing you energy costs.
- Home Energy Scotland to conduct further assessments to maximise your household income and access the financial support you are eligible for and entitled to. This may include a benefit entitlement check with the Department for Work and Pensions.
- Specialist providers who can provide additional support to help you meet your goals or improve your personal circumstances (e.g. housing associations, local authorities, health providers etc.)

Additional Information

For more information about the Wise Group's commitment to data protection, your rights under data protection law, our fees policy or how to contact our Data Protection Officer please read our Privacy Notice Supporting Information document, available on our website:

<https://www.thewisegroup.co.uk/wp-content/uploads/2019/04/QCS009-Privacy-Notice-Supporting-Information-v1-April-2019.pdf>.

About this privacy notice

We keep our privacy notices under regular review. This notice was last updated 3 September 2019.

This notice does not form part of any contract of employment or another contract to provide services. We may update this notice at any time but if we do so, we will provide you with an updated copy of this notice as soon as reasonably possible.

We want to hear from you and keep your data safe, accurate and complete. Please keep us informed about any changes regarding your personal data during your relationship with us.