

## CIPA PRIVACY STATEMENT

At CIPA we are committed to taking your personal information seriously. The information provided to us will not be sold to any third party by CIPA. It will not be disclosed to any third party for any purpose unless agreed by you, for example inclusion in a members list available to members or the public.

We will only collect personal information from those who choose to communicate with or purchase services from us. We will only use this information to inform you about the benefits and services CIPA provides that you may be interested in.

Our Privacy Policy covers how we collect, use, disclose, transfer and store your information. Please take a moment to familiarise yourself with our policy.

## WHY WE COLLECT YOUR DATA

As a chartered membership organisation, CIPA collects data to provide individuals (members and non-members) with information, services and products.

## WHAT INFORMATION IS BEING COLLECTED?

CIPA collects, processes, and uses information provided by you relating to your membership of CIPA; past or potential membership of CIPA; use of CIPA's services; purchase of CIPA products or goods; examinations or assessments administered by or on behalf of CIPA; employment as a member of staff; or engagement as contractor or consultant. The information we hold is dependent on the relationship you have with CIPA, but typically includes:

1. Contact details: where appropriate CIPA records your title, full names, any designatory letters after your name, your job title, employment or contract type, the name of your employer, office & home addresses, telephone & fax numbers, email & website addresses;
2. Other personal data: where appropriate CIPA records your date of birth, gender, educational qualifications together with dates and institutions, professional qualifications and any honours you hold, your membership of other bodies including directorships and trusteeships, your dietary requirements, any medical information you provide;
3. Your interests: where appropriate CIPA records information you provide relating to your professional areas of expertise & your professional interests;
4. Financial data: where appropriate CIPA records information you give us relating to subscriptions & other payments to CIPA, plus any information generated by us, your bank or any other related agencies to record payments, dates, reminders, direct debit payments or standing orders to CIPA, credit card payments, bank details & other related financial transactions;

5. Activity data: where appropriate CIPA records information relating to your continuing professional development (CPD), events or activities CIPA invites you to and your attendance, elections in which you've been invited to vote (but not the votes you have cast), your membership of or involvement with CIPA Council, CIPA committees, CIPA working parties or groups and any CIPA offices or positions you might hold or any positions on outside bodies where you represent the interests of the profession;
6. Commercial data: where appropriate CIPA records information including CIPA related financial data about bookings, subscriptions or purchases related to CIPA's activities, for example room hire, catering, equipment hire, administrative support or other products or services;
7. Publicly available data: where appropriate CIPA records information taken from company accounts and other publicly available sources;
8. Personnel data: where appropriate CIPA records information about the people we employ, have employed or otherwise worked with, either directly or in the capacity of contractors or consultants;
9. Survey data: where appropriate CIPA records information gathered through surveys used by CIPA for research purposes; and
10. Cookies information

CIPA uses cookies for the following purposes;

- a. Analytical - to help us analyse the performance and use of our website and services.
- b. Authentication - to identify you when visiting and navigating through our website.
- c. eShop – to maintain the state of your shopping cart once you add a product.
- d. Cookies consent – we use cookies to store your consent.

## HOW WILL YOU COLLECT MY INFORMATION?

We will collect data directly from you (for example from your membership application, examination registration, booking to attend an event, IP clinic, IP Pro Bono application or recruitment to work for CIPA) and will create some data internally (for example when we assign you a member number or determine examination results).

We may also collect some data from external sources. For example, employers and educational institutions may provide CIPA with relevant information on members and students employed by and/or studying with them; members of the public may provide information to CIPA when seeking the services of our members or in relation to complaints and/or investigations.

## WHAT WILL YOU DO WITH MY INFORMATION?

Dependent on the relationship you have with CIPA, CIPA uses and processes your data for the following purposes:

1. To determine your grade or grading potential for CIPA membership or to confirm professional standing, based on your qualifications, experience and professional history;
2. To ensure that CIPA publications and general information about CIPA are sent to you according to your preferences;
3. To process qualifications, examinations or assessments administered by or on behalf of CIPA;
4. To create, monitor and support CPD to support professional practice. This may include the transferring of CPD data between CIPA and a regulatory body by secure means;
5. To produce invitation lists to CIPA CPD activities, events or related activities;
6. To pass on, where you have given your express consent, contact details (such as email address or preferred telephone number) to other members or organisations;
7. To answer a legitimate enquiry as to whether or not you are in membership of CIPA, on a yes or no basis;
8. To use your information where you have given CIPA your express consent to publicise CIPA's work, activities and programmes;
9. To ensure that the correct subscription fees, payments and information are processed at the correct time;
10. To record payments of subscription fees, invoices, etc;
11. To enable the production of management & audited accounts, research and surveys, statistical and other analyses so that CIPA can be well managed;
12. To provide materials for historical research;
13. To manage our employment practices in a fair, efficient, and effective way; and
14. Any other purpose which CIPA notifies you about from time to time and about which you will be given the right to object to at the time of notification.

## HOW LONG WILL YOU KEEP MY DATA?

1. Data relating to an individual who is or has been a member of CIPA may be kept and processed indefinitely for historical purposes. Applications for membership, web form submissions and other applications or updating data (but not financial data) and minutes and transactions will be copied & stored indefinitely on secure servers, compact data disc or a similar storage media. This data may be placed in CIPA's secure archives and may be made available for purposes of research, history and statistical analysis.

2. Other than the data identified above, data on an individual who has lapsed, resigned from membership or who has been expelled from membership may be edited to ensure that only data necessary for historical purposes is processed, except where the individual owes outstanding subscriptions or other monies, in which case a record of that debt will be retained and processed or where the individual has received a membership sanction from CIPA, in which case a record of that decision and the reasons for it will be kept and processed. Financial data on an individual who has resigned will normally be held for up to a minimum of six years in accordance with company law for auditing purposes.

3. Examination results data will be kept indefinitely and will be used to confirm results to candidates, for academic research, or to provide historical record. Marked examination scripts will be kept for 3 months after results are published and during this time will be kept within a secure confidential document facility. Any marked examination scripts during that time, or after, used in whole or in part for illustrative, training or archive purposes, will be anonymised.

Examination scripts are specifically exempted from the DPA. This does not include any comments, annotations or marks made on the scripts by Examiners or Assessors, which are included in the definition of personal data.

4. Data on an individual who is not in membership but who has purchased or engaged with products or services from CIPA will normally be kept and processed for a minimum of six years.

5. Data on a data subject who is otherwise involved with CIPA will be kept for a period of time commensurate with the purpose for which the data is kept, for example data on someone who has made a substantial contribution to the work of CIPA will be kept indefinitely.

6. Data on employees or past employees will be kept and processed for a minimum of six years.

## WHAT ARE MY RIGHTS?

You have the right to find out what data we hold about you or requests for disclosure. These can be sent to:

The Data Controller  
The Chartered Institute of Patent Attorneys  
2nd Floor Halton House  
20-23 Holborn  
London  
EC1N 2JD  
or alternatively email: [mail@cipa.org.uk](mailto:mail@cipa.org.uk)

You can exercise your right not to receive products or services from CIPA at any time by communicating your preferences to the Data Controller.

You can exercise your right to request to have your personal data erased by contacting the Data Controller. CIPA will respond to any such request within one calendar month of receipt.

## WILL YOU DISCLOSE MY DATA TO THIRD PARTIES?

CIPA does not sell, provide or supply personal data to third parties for commercial purposes or for financial gain. CIPA will only make personal data available to third parties:

1. Where you have given your express consent (e.g., for your contact details, interests & other material to appear in any Directory or Register of Members, whether electronic or printed, or for your contact details and your interests to be passed to others to enable the formation of, committees, special interest groups or other professional processes);
2. Where it is necessary to fulfil our obligations to you (for example, when your name & address are given to a mailing house or distributor so that CIPA communications, notices or other materials can be dispatched to you);
3. To answer an enquiry from a legitimate source as to whether or not you are in active membership of CIPA;
4. Where CIPA employs a contractor or consultant to reconfigure, upgrade or renew software or hardware systems employed to process membership or other data, limited to the data required to perform such functions;
5. Where it is necessary to comply with an order from a regulatory or statutory body which is empowered to require us to release your data; or
6. In the case of CIPA contractors, consultants or staff, to supply references and other data on request. In these cases, only sufficient data will be released to enable the third party to carry out the purpose for which the data is released.