

## **R4K Privacy Plan**

### **Consent to the Collection of Personal Information**

- 1) Regarding Rafter 4K's collection of personal information, consent is voluntary and informed.
- 2) We will not alter, mislead, or withhold information from our clients or potential clients to obtain consent. We leave it up to our clients to provide us with the information below to the extent they feel comfortable rather than requiring they notify us if they do not want certain information collected.
  - a) All information collected is voluntary on the part of the client
  - b) Although we do our best to ensure the nature and purpose of the information we collect is made clear, we are willing to clarify and answer any questions about the collection of personal information
  - c) If clients do not feel comfortable disclosing certain information, we will do our best to be flexible and come up with solutions whenever possible
- 3) When possible, express consent will be obtained. This includes but is not limited to:
  - a) Agreeing on pricing for products
  - b) Signing a contract for work to be completed
  - c) Allowing us to contact suppliers/subtrades regarding the project
  - d) Providing reviews, project satisfaction information
- 4) Where necessary, implied consent will be obtained. This includes but is not limited to:
  - a) Submitting contact information through a quote request web form
  - b) Submitting contact information over email or phone
  - c) Providing personal preferences/opinions in discussion about potential/ongoing projects
  - d) Providing budget information
- 5) When consent to collect information is given Rafter 4K still maintains the responsibility to protect the client's personal information
- 6) Individuals have the right to withdraw their consent to our collection and storage of personal information at any time
  - a) If individual chose to withdraw consent, they must be made aware that this can impact the progress or completion of their project

### **Privacy Statement**

As a part of the regular course of doing business we collect personal information from our customers. Outlined below is the nature and purpose of the information we collect and what we are doing to manage this information.

#### **What initial information do we collect?**

If you voluntarily contact us regarding our services, we ask you provide us with the following information:

- Name
- General location of the project
- Phone number
- Email address

- Project ideas/preferences
- Approximate/desired budget

However, as this contact is voluntary the information you provide us with is completely up to you – at the time of a first contact we leave it up to you to decide how much information you are comfortable sharing.

#### **Why do we collect this information?**

- To manage our customer relationships and follow up on leads to maintain great customer service for all potential and ongoing clients
- To get an idea of the potential project to see if moving forward would be a good fit for both parties involved

#### **Who has access to this information?**

At the initial contact stage, the only people who have access to this personal information are the Admin team and our project manager, so we can review this and follow up the lead to the best of our ability.

Once we move past the initial contact stage and begin to schedule meetings or site visits to provide estimates there is some additional information we collect.

#### **What additional information do we collect?**

- Address
- Postal code
- Square footage/layout of house/property/area where work is to be completed

#### **Why do we collect this information?**

- To locate the potential jobsite and have it on file for if the job is to move forward
- To make accurate estimates and come up with plans for the potential/future project
- To write up a thorough contract with all relevant information for both us and the client in order to make the contract legal

#### **Who has access to this information?**

At the stage of preliminary meetings and coming up with estimates our Project manager and Admin team are still the only people with access to this information.

Once a contract is signed the consent to pass on address and planning information to employees is granted as this is necessary information in order to locate, access, and complete work at the jobsite. Personal preferences and opinions about products/services will only be shared with employees if this knowledge is imperative to the successful completion of a project. Personal financial information regarding client's budget and the costs associated with the project will not be shared with employees other than the project manager and the admin team at any time.

#### **How do we collect personal information?**

Preliminary information is collected via one of the following means:

- Through a web form accessed on our website. The web form asks for basic information but the only required field is prospective client's emails as a means for us to contact them about their project.
- By email, as provided on our website. Emailing Rafter 4K is completely voluntary and there is no obligation for specific information once contact has been made through an email.
- By phone, as provided on our website. Calling Rafter 4K is completely voluntary and there is no obligation for specific information once contact has been made over the phone.

Additional information is collected via one of the following means:

- Through a follow up email or phone call. In these phone calls we may ask clients certain questions about personal information, however the information they provide is up to their discretion.
- Through face-to-face meetings with clients. For face-to-face meetings to occur certain personal information must have been disclosed, but beyond that it is up to the client what information they provide moving forward with their project.

### **Where do we keep personal information and how is it secured?**

Personal information is stored electronically on protected computers that are stores in an office with a security system. The documents where the information is stored are also in files that are password protected. Passwords to access these files are updated and these files are monitored for any suspicious activity on a regular basis.

Any personal information that is stored on paper in a physical copy is stored within our office that has both standard locks and a security system.

### **How long do we keep personal information for and how is it disposed of?**

- Contact information
  - If we move forward with and complete a project this information is retained indefinitely in a protected file. Due to the nature of our business we retain this information to follow up on our work and manage our customer relations after a project is finished.
  - If we do not move forward with a project this information is retained for a period less than a year and then we remove the contact information from our system through electronic means
- Product/service information and opinions about products and services
  - If a project moves forward and is completed this information is retained for a duration of time following the project. The duration this information is kept for depends on the nature of the information; for example, certain materials and supplies have warranty so we keep product information throughout the warranty period.
  - Certain information has a mandatory retention period under the direction of the CRA and other government entities; this information will be stored for the mandatory amount of time before being disposed of.
  - Once the period of warranty or mandatory CRA/government retention has passed, records will be disposed of via either electronic means or, if retained on a paper copy, through shredding.

- Requests to review or dispose of contact information or product/opinion information
  - At any time through the project clients may request to see what personal information we have on file regarding their contact, purchases, opinions, etc. and review or revise it to maintain accuracy
  - During the project, information essential to its completion must be retained once it has been collected with express consent. However, once a project has been completed clients may request that we dispose of any information regarding contact, purchases, opinions, etc.

Our staff will be happy to answer any questions you may have about your personal information. If you would like more information, or you would like to see exactly what personal information we have about you in our records, or you wish to register a complaint, please contact:

Norm & Sandi Kneller/Owners  
6025 Farmers Drive  
(250)765-0856  
info@rafter4k.com

You can also contact the Privacy Commissioner of Canada for assistance between the hours of 8:30 a.m. to 4:30 p.m. est, at:

Toll-free: 1-800-282-1376  
Phone: (819)994-5444  
Fax: (819)994-5424  
TTY:(819)994-6591

or by mail at:

30 Victoria Street  
Gatineau, Quebec  
K1A 1H3

or on the web at:

<http://www.priv.gc.ca>