

Dronfield and District u3a

Privacy Policy Version 2.4

This document is available on the [Policies](#) page of the DDu3a website.

Date Approved: 20 Nov 2023

Next Review Date: no later than March 2026

1. Background and objectives

- a. Dronfield and District u3a (hereafter 'DDu3a') treats members' privacy rights seriously. The u3a's [Legitimate Interest Assessment](#), [Personal Data Management Policy](#) and this Privacy Policy together set out in detail how it complies with its legal obligations to process and protect personal data. They also define individual members' responsibilities for handling their own and other members' personal data.
- b. This policy sets out how 'personal information' is dealt with: that is, information that could identify, or is related to the identity of, an individual.
- c. If any material changes are made to this policy, members will be made aware of these by email and through announcements both in the Newsletter and at monthly General Meetings.
- d. Please direct any questions about this policy, any complaints about our privacy practices or requests for the policy in an alternative format to the Membership Secretary:
Email: membership@dronfieldu3a.org.uk
Telephone : 01246 900201

2. What personal information do we collect?

When members join DDu3a they are asked to provide the information specified below:

- a. Name and home address (including whether this address is shared with another member).
- b. Email address.
- c. Home telephone and mobile numbers.
- d. Emergency Contact Information (usually next of kin). This is for use in the event of an accident or incident only and is collected on the basis that it is provided with the consent of the named emergency contact.

In addition, the u3a keeps a list of the Groups to which members belong and a history of payments made by members, and the methods of payment. This history includes details of annual membership subscriptions, the member's Gift Aid preferences, payments for trips and visits and, in some cases, payments for memberships of specific groups.

3. How is this personal information collected?

All the personal information collected is obtained from members themselves, using printed or online application forms. Financial and other information is collected through transactions entered on the u3a's secure membership management system.

4. How is personal information used?

All personal information is stored securely and used:

- a. To provide our services and activities to members.

- b. To send members general information about the Third Age Trust, the national organisation to which all u3a's are affiliated, and about the regional u3a network.
- c. To send members messages by email, other digital methods, telephone and post to advise them of DDu3a activities.

5. Sharing of personal information (See also Personal Data Management Policy)

Information about members, including relevant parts of their personal information, is shared on a need-to-know basis in accordance with these rules:

- a. Internally - to some Trustees and other members of the u3a who are not Trustees but who perform defined duties on its behalf - as required to facilitate DDu3a members' participation in DDu3a activities.
- b. Externally – where an external membership management system is used for products or services such as direct mailing for the Third Age Trust's magazines (Third Age Matters). This requires each member's individual consent. Members' data will not be shared with Third Party organisations.
- c. Externally - with PayPal, if using our online services to pay their membership fees, either when joining or when renewing.
- d. Where a member's personal and/or emergency contact information needs to be shared outside of DDu3a the member's permission will be sought and a full explanation provided, in accordance with our duty of care.
- e. Members may choose to have their personal information hidden from Group Coordinators. The information that can be hidden includes postal and email addresses, home and mobile telephone numbers but not emergency contact data.
- f. Personal information cannot be hidden from DDu3a members who have authorised access to the full membership database to perform their roles within the u3a.
- g. Any member wishing to hide their personal information should contact the Membership Secretary (see paragraph 1.c).

6. How long is personal information kept?

In most instances the information will be stored for 7 years for accounting and financial purposes. The exceptions to this are instances where there may be legal or insurance circumstances that require information to be held for longer whilst an issue is investigated or resolved. Where this is the case then the member/s will be informed as to how long the information will be held for and when it is deleted.

7. How information can be updated or corrected

To ensure the personal information we hold is accurate and up to date, members are required to inform the u3a of any changes to their personal information or circumstances.

- a. Information can be updated at any time by either by contacting the Membership Secretary (see paragraph 1.d) or by members updating the information themselves online via the Members' Portal. For information about the Portal see the Members page on the website.
- b. For joint memberships, any changes made to an address or landline telephone number are automatically applied to both members' details. If this is not the desired

outcome members are advised not to use the Portal but to contact the Membership Secretary instead.

- c. On an annual basis, as part of the membership renewals process, members are asked to check that their information is correct.
- d. Members can, at any time, request to see the information that DDU3a holds about them by contacting the Membership Secretary (see paragraph 1.d). There may be certain circumstances where we are not able to comply with such requests. This would include where the information may contain references to other individuals or for legal, investigative or security reasons. Otherwise we will usually respond within 14 days of a request being made.

8. How is personal information stored and secured?

- a. Personal data is protected by keeping it within a secure computer system ("Beacon") centrally managed by the Third Age Trust nationally. Access to this system is restricted to specifically authorised members of DDU3a, to members of the Third Age Trust's Beacon Support Team and to employees of companies contracted by the Third Age Trust to support the Beacon system.
- b. In addition, all DDU3a members are made aware of and are expected to comply with DDU3a's Personal Data Management Policy. This provides general guidance for all members and specific guidance for officers and post-holders, on their personal responsibilities for safeguarding members' personal data.
- c. Similarly, members of the Third Age Trust's Beacon Support Team and employees of external companies who have access to Beacon are required to sign confidentiality agreements indicating their acceptance of their legal responsibility to maintain the confidentiality of the data to which they have access.

Document History		
Date	Version Number	Summary of Changes
20 Nov 2023	2.4	<p>Section 1a inserted, 1b, 1c and 1d renumbered from 1a,1b and 1c.</p> <p>Section 2e deleted as DDU3a no longer asks for, or holds records of, members' consent to use their images in its publicity.</p> <p>Section 3 amended to differentiate between sources of personal, financial and other information about members. Reference to members giving consent to hold their data deleted as DDU3a now uses Legitimate Interest rather than Contract as the basis for holding members' data.</p> <p>Miscellaneous corrections to spelling, grammar and cross-referencing.</p> <p>Date of version 2.3 changed from "DATE" to 20 March 2023.</p>
20 Mar 2023	2.3	<p>Reformatted and paragraphs re-numbered (eg from 1.1 to 1.a) to meet DDU3a's policy standards.</p> <p>U3A changed to u3a.</p> <p>Change of Membership Secretary's email address in 1.c.</p> <p>Gift Aid inclusion in paragraph 2</p> <p>Paragraph 5.a re-phrased to clarify that access to data may be given not just to Trustees but also to members who are not Trustees but are performing defined roles for the u3a.</p>

10 Feb 2020	2.2	Membership Secretary specifically named in clauses 5.1 & 5.6
27 May 2019	2.1	Membership Secretary's personal address removed. Phone number updated.
Feb 2019	2	Re-written to dovetail with new <u>Personal Data Management Policy</u>
14 Mar 2018	1.2	Wording of PayPal statement simplified. Section 9 (Availability and Changes to this Policy) and Section 10 (Contact) moved to Section 1 (Introduction)
13 Mar 2018	1.1	PayPal statement added to Section 5
28 Feb 2018	1	New policy approved