



# EVESHAM & DISTRICT U3A

## Privacy Policy

### 1 Introduction

Evesham & District U3A (hereafter 'the U3A') treats your privacy rights seriously. This privacy policy sets out how we will handle your personal details, i.e. information that could identify, or is related to the identity of, an individual.

### 2 What Personal Information do we Collect?

When you express an interest in becoming a member of the U3A you will be asked to provide certain information. Your:

- Name – forename, surname and title and (if you wish) the name by which you like to be known
- Home address
- Email address (optional but our preferred method of communication)
- Phone numbers (landline and/or mobile)
- Personal photo (if provided)

**Your name and home address are essential for membership.**

### 3 We also Hold for Administrative Purposes

- Your membership number, membership status, last payment method, Gift Aid date of confirmation (if applicable), any financial transactions which have gone through the Beacon system
- Interest groups to which you belong and other groupings relevant to managing our U3A
- Newsletter delivery arrangements
- Third Age Matters & Sources (national magazines) requirement
- Any Official role and Beacon access rights granted (if applicable)
- Details of joint membership

### 4 How do we Collect this Personal Information?

All the information collected is obtained directly from you. This is usually at the point of your initial registration. The information will be collected via membership forms. At the point that you provide your personal information for membership purposes, we will also request that you provide consent for us to store and use your data. Your consent is required to ensure our compliance with data protection legislation.

### 5 How do we Use Your Personal Information?

We use your personal information:

- To provide details of U3A activities, courses and events
- For administration, planning and management of our U3A.
- To communicate with you about your group activities.
- To monitor, develop and improve the provision of our U3A activities.

We will send you messages by email, other digital methods, telephone and post to advise you of U3A activities.

## **6 With Whom do we Share Your Personal Information?**

We may disclose information about you, including your personal information:

- Internally - to Committee Members, Group Leaders and Officials – as required to facilitate your participation in our U3A activities.
- Externally – where we use an external membership management system (Beacon), our website and for products or services such as direct mailing for the Trust magazines (Third Age Matters and Sources). Where such systems are used, the committee has scrutinised the Terms and Conditions of each supplier and judged that their digital and physical systems and procedures are secure.
- If we have a statutory duty to disclose it for other legal and regulatory reasons (e.g. Gift Aid claims to HMRC).

Where we need to share your information outside the U3A, e.g. in an emergency whilst on a U3A-organised outing, we will, if possible, seek your permission and inform you with whom the information will be shared, and for what purpose.

## **7 How Long do we Keep Your Personal Information?**

We need to keep your information so that you can best benefit from your U3A membership. Information about your current membership will not be stored for longer than necessary and only for an extended period after your membership ceases, in exceptional circumstances such as:

- instances where there may be legal or insurance circumstances that require information to be held whilst this is investigated or resolved. Where this is the case, the member/s will be informed how long the information will be held and when it is deleted.
- gift aid declarations which are valid from when signed until rescinded and then kept for an additional 6 years.

## **8 How your Information can be Updated, Corrected or Removed**

To ensure the information we hold is accurate and up-to-date, members need to inform the U3A of any changes to their personal information. You can do this by contacting the Membership Secretary at any time.

Contact details are available either on the website or in a recent newsletter.

On an annual basis you will have the opportunity to update your information, as required, via the membership renewal form. Should you wish to view the information that the U3A holds on you, you can make this request by contacting the Membership Secretary – as detailed above. There may be certain circumstances where we are not able to comply with this request. This would include where the information may contain references to another individual or for legal, investigative or security reasons. Otherwise we will usually respond within 14 days of the request being made.

## **9 How do we Store Your Personal Information?**

We have in place a range of security safeguards to protect your personal information against loss or theft, as well as unauthorised access, disclosure, copying, use, or modification. Security measures include technological measures such as Secure Socket Layer (SSL) encryption, which creates a secure connection with your browser when you register and login into our online services.

Your membership information is held on a database membership management system (called Beacon – specifically designed to meet the needs of U3As) and accessed, wholly or in part, by the Beacon Administrator, Committee Members, authorised Officials, the Independent Examiner (of our annual accounts) and Group Leaders.

## **10 Availability and Changes to this Policy**

This policy is available on our website or from the Secretary if you do not have access to it, and may change from time to time. If we make any material changes we will make members aware of this via email, the Newsletter, on the website and at the monthly members' meetings.