

Exe Valley U3A Data Protection Statement

Exe Valley U3A's lawful basis for collecting, keeping and using members' personal data is that there is an unwritten but legal contract between a member paying a subscription and Exe Valley U3A providing membership benefits in return. This 'contract' gives us the right to hold and process member's data- **but only to the extent it is necessary** to do so in order to provide efficient membership services.

Our privacy policy is a separate document and is available on the Exe Valley U3A website and on request from the U3A secretary.

The data we collect and hold is:

- Name.
- Home address.
- Email address.
- Telephone number.
- Subscription preferences.
- Membership of other U3As
- Form for claiming gift aid. (Optional)
- Emergency contact details (optional)
- Members interests (optional)
- Members skills (optional)

Personal data is only collected directly from the member through the membership application form and renewal forms.

The internal users of the data are committee members and group leaders. They only have access to the data that is of legitimate use to them to perform their responsibilities.

Data will not be shared with any third parties (including the Third Age Trust) other than to provide your membership benefits (for example with the printers if you want the National Office magazine, with HMRC for those claiming gift aid and the Beacon system, which uses an external computer system). In such cases, we will only use organisations who are GDPR compliant. In the unlikely event that we have imposed on us a statutory duty, legal or regulatory reason to disclose data, members would be informed in advance.

Data is password protected, and Beacon uses an encryption system.

Data is not kept for more than 6 months beyond the membership year, with the exception of Gift Aid records, that are required to be kept for 6 years, and any general information for historical records purposes.

Group leaders may keep a separate record of their group members' contact data. They may share this data with interest group members with the members' permission, but are not permitted to share it with other U3A members or third parties. Paper records will be kept securely.

Exe Valley U3A undertakes to abide by the GDPR (General Data Protection Regulation) principles

Exe Valley U3A will use members' personal data only to provide membership benefits including, but not exclusively, for:

- Communicating with members about U3A events and activities including those organised by the Third Age Trust.
- Group Leaders informing group members about group activities.
- Adding members' details to the direct mailing information for the Third Age Trust magazines for those wishing to receive them
- Communication with members about their membership and/or its renewal.
- Communicating with members about specific issues that may have arisen during the course of their membership.

The U3A will ensure that members' information is managed in a way not to infringe members' rights. Members' contact details will not be published in any internal or external document without the member's consent.

To ensure members' personal data is accurate and up to date we ask members to inform the membership secretary of any changes in personal information. All members' information will be updated on the basis of annual membership renewal forms.

Any member can request to see the data held on themselves. Such a request should be sent to the U3A secretary and we will expect to respond within 14 days unless we are not able to comply due to legal, investigative or security reasons.

Reviewed June 2023