

U3A

HAMPSHIRE SOUTH CENTRAL NETWORK

Notes of the SCN Membership Secretaries Meeting

held on Tuesday 12th February 2019
at the Community Centre, Wickham at 1.30 p.m.

PRESENT:

Sally Ingledew (SI)	SCN Manager
Brian Barrett (BB)	Meon Valley (Meeting Host)
Sue Dobson. (SD)	Horndean (Assistant Treasurer)
Tricia Norman (TN)	Horndean (Membership Secretary & Treasurer)
Linda Hugo-Vieten (LH)	Portsdown (Chair Person)
Julie Bloomfield (JB)	Portsdown (Membership Secretary)
Peter Haskell (PH)	Hayling Island (Membership Secretary)
Jenny Mallett (JM)	Meon Valley
Bety Hiscock (BH)	Meon Valley (Secretary)
Graham Dandy (GD)	Meon Valley (Treasurer)
Julia Field (JF)	Meon Valley (Committee Member)
Jan Ernest (JE)	Meon Valley (Committee Member)
Ray Gardner (RG)	Lock Heath (Membership Secretary)
Carol Ann Turner (CT)	Havant (Membership Secretary to be)
Richard Ryan (RR)	Solent (Membership Secretary)
Yvonne Apperley (YA)	Stubbington (Membership Secretary)
Tony Jackson (TJ)	Warsash (Membership Secretary)
Jim Bushby (JB)	Meon Valley (Chairman)
Kevin Stock (KS)	SCN Administrator
Bunty Davison (BD)	SCN Note/Secretary

- 1. Welcome/Introductions:** Brian Barrett (Meon Valley) who was hosting the Meeting welcomed everyone to the Wickham Community Centre. Sally Ingledew also welcomed the Group representatives and thanked them for their attendance. KS explained that the Attendance Register and Contact Sheet which was being circulated was required to cover the distribution of the meeting details and SI gave a brief introduction reference the Agenda items to be discussed.

- 2. Membership Secretary's Role - Descriptions and Copies:**

Comments were received from:

Stubbington – Membership Secretary (YA): I don't have my job description with me but will try & think of all the jobs I do. I've been in the Memb Team for past 3 years. 1st year was an assistant. Membership Sec for past 2 years. I'm giving up in May & my Assistant will take over the role of Memb Sec. We have 540 members & still growing.

I'm the first point of contact generally for new Members wanting to join. They contact me via the internet, post, monthly meetings & telephone. Give enquiry packs containing letter from membership Secretary, application form, pro rata price list & current news letter. When they join I collect form & money. They have a welcome pack containing their membership card, brief GDPR policy info & Emergency contact info with a welcome letter from the Chairman & current NL if they hadn't already received one. All our policies & job descriptions are on the Stubbington U3A website. I Pass all completed forms & money/ cheque to Treasurer. I started using Beacon in August last year & found it very good & easy to use so far! I still have a data base as a back up, pass word protected!

Solent – Membership Secretary (RR): The Group has a role description which needs to be updated as the Beacon system is now being used. The previous Membership Secretary had managed his own system. Similar administration to the Stubbington Group with a twice monthly talks meeting. Membership renewals and forms will be available until the end of February and new members receive a Chairman's welcome letter and information pack.

Locks Heath -- Membership Secretary (RG):

Job description showing twelve points was available at the meeting for information. The Beacon Data Base system is in use. A Laptop is owned by the Group to provide a Barcode facility and is used to source all members' details, all renewals and new members' information packs are available. Signing in at Meetings now is discarded due to use of the Barcode machine - therefore 'tick' style register is not used and statistics are available. The cost of purchasing a Barcode Machine was discussed. This can be as low as £20

Meon Valley: The Group does not have a Membership Secretary due to their low membership numbers – 129 members. No increases in membership exist. Their target of 140 is not being achieved since an annual membership turnover has been approximately 20. The Committee of five members share administration duties and membership workload with the use of a spreadsheet system. Security was questioned regarding protection of members' data. The use of a shared password is in place but In view of this it was suggested that the U3A should consider the 'Cloud' ie Dropbox system to provide support and protection of the U3As workload.

Hayling Island - Membership Secretary (PH): I took on the role a few months ago on the basis that it was web based rather than discrete spreadsheets with their attendant potential storage and security issues. The web based system was devised by our own webmaster and as membership secretary I maintain the database for our 500 members and process renewals and new memberships as well as attending committee meetings. There are different levels of access/permissions as appropriate for members and officers. Main features of the web based system appear in the Privacy Policy to which there is public access

Portsdown – Membership Secretary (JB): Job Description available and Beacon system in use. Treasurer and Membership Secretary collect renewals, Assistant Treasurers deals with resignations and non-renewal. Group leaders are involved and can collect cheques. Use of Beacon system is established and used for reports at Committee Meetings. New Members' packs are available for distribution.

Horndean – Treasurer and Membership Secretary (TN): Beacon system not in use but updated main spreadsheets for membership, Committee Meetings and monthly

meetings reference attendance sheets. Horndean and District leaflets are used to provide information for members and DropBox system is being used for their 210 membership.

Waterlooville – (KS): As the Membership Secretary was on holiday KS reported in her absence. The Beacon system is in use with the Membership Secretary being the first point of contact for new members and circulation of membership cards and information. New members are sent details of Coffee Morning dates and the use of emergency cards which are encouraged. As Membership Secretary deals with renewal forms – she is the Data Base Controller but passes details to Treasurer and deals and manages the Gift Aid submissions. The Group permits one month's lapse concerning renewals. The provision of data to the National Office reference the members' circulation of the Trust's Magazine is covered by the Membership role plus the issue of stickers to new members when they attend the monthly General Meetings.

Warsash – Membership Secretary (TJ): It was reported that the Beacon system can provide problems regarding data particulars and therefore their data is covered by the support of a hard disc. The Group does not find a job description particularly of use when handing over the workload to a new administrator but four members of the Committee have written their own job descriptions.

In conclusion SI comments were that due to the views expressed it was most necessary for one other person to have access to data systems. The sharing of job descriptions among the Group representatives can be obtained from the website and copies of those made available at this meeting will be circulated with the Meeting notes to all the e-mail Group contacts.

3. Membership Forms – Copies and Collection of Data:

Waterlooville: Applications for Renewal of Single and Joint Membership forms are circulated. The form identifies a postal address, name –and also offers the use of a 'known as' box/facility, mobile number and e-mail address, payment method, Gift Aid tick box section - signature and date.

Horndean: Do not use the 'known as' detail facility from applicants but the forms distributed are similar to those in use by other U3A Groups ie reference Waterlooville's summary. Applicants can read membership fees, payment methods, details relating to bank transfers, policy statements, Gift Aid terms and conditions. Information showing a tick box facility for data to be shared and members reminded to notify changes to names and addresses, e -mail addresses and Gift Aid details. They are encouraged to 'pay on line' and completion of such forms can be received by e-mail.

Portsdown: Forms are similar to the other U3A Groups. Half way through the year a form is used for Gift Aid details. Emergency contact details are required and a separate 'interest' form is issued. Renewals of subscriptions can be received and paid with cash at General Meetings and renewal reminders are sent by e-mail.

SI agreed to investigate the completion of the annual Gift Aid form details in relation to Data Protection regulations – GDPR Particulars regarding this issue to be clarified and included In the Meeting Notes.

Adam Walton from NEC confirmed that as long as the member indicates (usually a tick box) on the membership form, it is not necessary to ask for it every year. What members must be told is that if there are any changes in the U3As Privacy policy.

A further matter discussed and to be resolved was the possibility of members having access to their own secure data, reference changes of a current address and 'phone number – ie use of the Beacon system by members ie themselves.

Currently the situation is that the U3A decides whether members should access their details. A further point was that the acknowledgement email which is outside Beacon has all the details of that member if a change is made. This may be changed in the future, but is not considered very high risk.

Hayling Island: Similar particulars to other U3A Group exist with membership application forms available on line showing 'preferred' name, post codes, subscription fees, members and associate membership, bank transfers, conditions stated relating to Gift Aid showing coverage of 'tick' box declarations, GDPR Data, entry into a contract regarding issue of data to the U3A Trust.

Meon Valley: Similar comments received but an option is given to members as to whether they wish to receive the Trust's Magazine. Although the payment of a member's full subscriptions covers the cost of receiving for the Trust's Magazine, some U3As do cover the payment for the circulation of the Magazine to reduce the membership fees. This option is at the discretion of the U3A. Such payments affect the full annual subscription fee and therefore cheaper subscriptions can become payable if a member selects the non-circulation of the Magazine facility. Members receive a letter of welcome incorporating details relating to subscription rates, a privacy notice form, storage of data in compliance with GDPR and a signature authorisation field.

Locks Heath: Similar comments received but the need to specify data relating emergency contact details. The issue of Renewal Forms can be collected at General Meetings or posted. Forms are Beacon printed, identification of an emergency number are included on the form with a privacy statement. Forms should be kept for 7 years for Gift Aid. New members to be made aware of the U3As terms and conditions and the privacy statement information.

Stubbington: Use of web-site for issue of renewal forms. Cash subscription payments are taken at general meetings.

Warsash: Similar details to other U3As exist on the forms with emphasis to the privacy statement information but with no 'titles' field as although the U3A felt this allowed Beacon to automatically fill in the relevant sex. It was noted that the U3As Charity registration had just been received.

Chichester: KS had received details of their membership secretary's role. With a membership of 950 two membership secretaries provide a job share situation to cover the role with e-mails and the administration duties are covered by a mail box system. E-mails are sent and received by both Membership Secretaries. The Membership Secretaries have their own Bank Account with the Treasurer having access to the Account. The use of a Mobile 'Phone – Pay As You Go – system was used so that personal telephone numbers were not put into the public domain.

Stubbington: Similar comments received with an assistant receiving all e-mails.

Solent: The programme manager circulates renewal forms and new members application forms.

Discussion took place regarding use of the Beacon system to check information details of members and changes by computer literate Group Leaders and the update of such changes being sent by e-mail through to the Membership Secretary.

It is noted that Group Leaders cannot edit a members details.

SI stated the use of generic e-mail addresses is recommended but it was important to keep the forwarding address up to date.

4. Access To Data:

Warsash: The use of the Beacon system and audit trails provide their data information.

Group Leaders can view their membership data which requires their own access code and password and then can add details of their members and any changes.

Waterlooville: By use of the Beacon system Group Leaders can only send e-mails. KS as the Group Liaison Manager adds and removes members to groups.

Hayling Island and Meon Valley: Not operating the Beacon system.

Hayling Island explained Committee members have names and telephone numbers of their membership. Once logged into their programme members can have a choice regarding information and the checking of their own details.

Meon Valley: It was noted their web-site cannot be used for data information.

Horndean: Not operating the Beacon system. Use of a DropBox Account for data information and provides data security is in use. Membership e-mails can be sent.

Warash: Beacon data access available by the initial administrator which was set up with the Committee's approval.

Portsdown: Chairman, Treasurer and Membership Secretary only have access to the Beacon data. Reference Beacon membership details, it was noted that membership forms are kept for one year after leaving the Group and then to be destroyed although it was confirmed that Gift Aid declaration forms be kept for seven years.

Locks Heath: Membership file in existence as it was felt that the Beacon system does not cover all the membership issues to be managed.

SI stated that Committees must accept ownership regarding access to membership information.

5. Any Other Business – none.

The Stubbington Group's representative expressed thanks for a very informative meeting.

SI stated that for information the Role Descriptions details provided by Groups, copies of Renewal Membership Forms and the Chichester Information Sheet would be circulated by the web-site with the Meeting notes and SI would welcome the receipt of e-mails relating to note changes and web-site issues.

On behalf of herself and all the members present SI expressed thanks to the Meon Valley Group for organising the meeting arrangements, refreshments and facilities which had been most appreciated.

The Meeting closed at 3.15 p.m.

Appendix: A selection of Role Descriptions and Membership Forms



Role Description Membership Secretary

Introduction

The membership secretary is the first point of contact for all membership enquiries and is the membership database controller. He/she keeps the committee informed of numbers throughout the year.

Tasks

- Attend all committee, monthly and annual general meetings (or arrange a stand-in) providing a report on overall membership numbers as required.
- First point of contact on all membership matters/enquiries.
- Provide all new members with a membership card, membership information flier, personal invitation to the next available social coffee morning, WU3A website members' area username and password and ICE cards and instructions.
- Make sure that membership cards for the next year have been ordered ready for issuing in March / April.
- Make sure that membership joining and renewal application forms and letters are prepared, placed on the website and available in hard copy form from January onwards each year.
- Processes completed new members and renewal application forms.
- Keep and maintain an up-to-date database record of all members' details using the Beacon system.
- Act as Membership database controller

- Pass completed membership application forms and payments onto the treasurer.
- Supply the monthly meeting registration team with an up to date membership tick list, and a float in case paying visitors need change.
- Supply membership fliers and application forms for monthly general meetings and coffee mornings and information of any new members to coffee morning co-ordinators.
- If the News Bulletin Editor does not have access to Beacon, then provide monthly current email and non-email listings to them.
- Control and balance the monthly general meeting visitors' book giving Treasurer any income.
- Attend the annual network meeting of local Membership Secretaries each February.
- Send an up to date monthly list of members to the Secretary for contact purposes, giving Name, Phone, Email.
- Prepare Gift Aid donations form in correct format (HMRC) for Treasurer.
- 5 times a year send database to National Office before each Third Age Matters delivery in their required format.
- At the earliest point after renewals of memberships an audit should be carried out of all group members. The co-ordinators of all groups to give a list of their members to Group Liaison and this to be checked against paid up members.

Duties of the Hayling Island U3A Membership Secretary

- 1) Maintain the database on the website of members at all times. The membership database includes name, address telephone number, email address, joining date, subscription, newsletter option and gift aid details.
- 2) At each monthly meeting arrange for collection of visitor fees and the signing up of new members. Update website.
- 3) In **January?** Arrange for subscription renewal slip to be included in the **Winter/Spring?** Newsletter.
- 4) In **January** arrange for the printing of new membership cards.
- 5) In **March** arrange for several tables with volunteers to collect renewal subscriptions and issue of the new cards at the AGM. Update website.
- 6) From **March** onwards, process postal applications and bank to bank payments for renewals and membership and update website.
- 7) In **May** send out reminders to those who have not renewed by email where possible and by letter for those without internet. Automatic on website.
- 8) As membership secretary attend committee meetings – approx. once per month and report on status of membership. All reports available on website.
- 9) Pass all cash and cheques to the treasurer as and when required – revenues around £7000 over the year – nearer £10,000 for 2018/20.
- 10) Five times per annum submit a circulation list to the distributors of the national U3A magazine. Report available from the website.
- 11) Three times per annum produce address labels for the distribution of the newsletter. List generated by website.

Meon Valley U3A Secretary/Membership Secretary Role

1. Maintain list of members with Treasurer, on spreadsheet and hard copy. Spreadsheet password protected. Treasurer prepares list from subscriptions. Notify Treasurer of any changes to list.
2. Send Direct Mail information for TAM
3. Produce and print membership cards and Committee badges.
4. Correspond with members, sending out AGM details and any other items throughout year.
5. Collect Group member names and that they are paid up.
6. Send monthly reports on meetings and U3A information to local Parish magazines.
7. Maintain U3A website updates, main contact for enquiries.
8. Produce signing in Register for meetings.
9. Take minutes of Committee meetings.
10. Anything else required.



52 Old
Turnpike

Meon Valley

Fareham, PO16 HG

Dear Members,

Welcome to another U3A year,

Please look very carefully at the whole of this communication. You will have heard of the new Data Protection Act and how it is going to affect all organizations. Our Treasurer, Graham, has come up with a statement and privacy policy for MV U3A which is on the back of the subscription form. It is **VERY** important that you read and complete it, keeping a copy for your own records. Subscriptions remain at £10 thanks to Jenny our previous Treasurer's sterling work.

Thanks go also to Jan for organising our successful summer trips, and to Brian for producing this year's programme which includes a return of the Soberton Strummers. Keeping to the U3A ethos of self-education, we have seven talks by members in the programme. We will also be hearing from our special interest groups in January to let you know what other learning opportunities there are. It is of concern that at least one of our groups is not continuing, so please can you think of new group subjects to suggest that you and others would be interested in? How about watching films while enjoying a cup of tea and discussing them afterwards?

Mentioning tea - Sheila and the other tea ladies have made a plea for more MALE volunteers in the kitchen please. Thanks to those who already help.

This my last year as Chair, so if you are interested, you are welcome to put your name forward now.

See you all in September,

Jim Busby (Chair)

SUBSCRIPTION AND PRIVACY NOTICE FORMS 2018 -19

Please complete BOTH sides of this form and return the WHOLE form to the Treasurer. Keep a second copy of the Privacy Notice for yourself. If there are two of you, each must complete and sign a form. To order Third Age Matters magazine only ONE of you need order it. You may combine your subscriptions and send one cheque. Please post to the Treasurer or bring to a meeting as soon as possible.

Please print

Name -----

Address -----

Postcode ----- Phone No. -----

e-mail (if available)-----

Are you (please tick) ... Renewing your subscription OR ... New member

Amount enclosed: (excluding magazine 'Third Age Matters') ... £10.00

OR: Including postage to receive 'Third Age Matters' £12.50

**Cheque payable to Meon Valley U3A. BRING to the first meeting, or SEND TO :-
Graham Dandy, 9 Rareridge Close, Bishop's Waltham, SO32 1PU**

U3A SOLENT UNIVERSITY OF THE THIRD AGE Registered Charity No. 1028438

Application for New Members 2019

Please print clearly in block capitals

Title(s) Name(s)

Address

..... Post code

e-mail address Tel No

Emergency Contact Name Tel No

Please tick box only if you wish your Programme, etc to be sent by email.

Please accept my/our subscription of £ (£15.00 per member / year).

Cheques should be made payable to **'SOLENT U3A TRUST'**

Please hand or send this form **plus** cheque (and sae if appropriate) to:

Richard Ryan

17 Laverock Lea

Portchester

Hants, PO16 8DA

Please tick this box if you wish your membership card to be sent by post. If you do please enclose a stamped addressed envelope; otherwise collect it at the next Talks meeting.

A **Gift Aid form** is enclosed for your consideration. If you are eligible for Gift Aid, we could reclaim the tax on your subscription if you complete the gift aid form.

As it adds little to the cost of distribution and saves a lot of work, your committee has agreed to U3A Head office mailing "Third Age Matters" direct to every household. This means us providing a copy of our database for each issue. The terms under which this is done are **'On the understanding that the database provided (usually five times a year) will be used solely for the distribution of "Third Age Matters" and will be erased by the mailing house after each distribution'**.

Please turn over

PRIVACY STATEMENT

Please tick the box below to give us permission to use the information you have supplied in the following ways:

- To store your personal data securely for membership purposes.
- To communicate with you as a U3A member.
- To share your personal data with group leaders for those groups of which you are a member.
- To send you general information about the Third Age Trust (the national organisation to which U3As are affiliated).

I consent to my data being used for membership purposes as detailed above.

Are you happy to be added to the direct mailing list for the Third Age Trust magazines – Third Age Matters and Sources? If so, please tick the box below:

I consent to my data being shared with the company who oversee the distribution of the Trust Magazines.

Please be advised that you can request for your data not to be used for any of these purposes at any time by contacting the Membership Secretary by email at memsec.solentu3a@gmail.com or by telephone, using the number on the back of our quarterly Programme.

Signed:

Date:

Application form

To join Hayling Island U3A, please complete the following application form. You will then see instructions for paying your subscription fee. Note this form is only for new members; if you want to renew your membership please [click here](#).

A coloured background in the form indicates a required field.

If you'd prefer not to apply online, [click here](#) to download an application form, or you can join us at any of our [monthly meetings](#).

Personal information you provide to us is held on the understanding that the information should not be divulged to any person or organisation unless solely necessary for the operation of this U3A. We comply with the Data Protection Act and - in particular - the data protection principles as well as the EU General Data Protection Regulation (GDPR). You can read our detailed privacy policy [here](#)

Title: Your first name: Your last name: Your preferred name if different to your first name: Your email address: Your phone number if you have one: Your mobile phone number if you have

one: Your address: Your Postcode:

If you want to join as an associate from another U3A, please provide the name of your home U3A. Otherwise, please leave this field blank.

Your home U3A:

Gift Aid increases the value of your subscription by 25% at no cost to you. If you pay income tax, Hayling Island U3A can claim Gift Aid on your behalf throughout your membership. So, if it applies to you, please complete this declaration...

- I pay the amount of income tax and/or capital gains tax at least equal to the tax the Charity will reclaim on my donations in this tax year (currently 25p in the pound)
- I will notify the Charity if my circumstances change and I no longer pay income tax and/or capital gains tax at least equal to the tax the Charity will reclaim on my donations in this or future tax years
- I will notify the Charity if I change my name or address

I confirm the above and wish to Gift Aid my contributions

No, for the time being

You can notify us at any time if you want to cancel this declaration or if you want to make one later. If you are unsure whether your donations qualify for Gift Aid tax relief, click [here](#).

Horndean & District

Registered Charity Number: EW23926

Membership Application Form 2018-19

Title Name

Address

Postcode

Email address

Telephone Nos: Home Mobile

Details of Home U3A if not Horndean & District

Home U3A Member No Expiry Date / /

Membership runs to 31st August 2019 and can be taken out or renewed on or after 1st July 2018. The subscription is **£15** or **£12** if your Home U3A is not Horndean & District. These rates are halved for membership taken out after 31st March 2019. Subscriptions may be paid online to Account 80628087 Sort Code 55-70-34 putting your first and second name and 'U3A Subs' in the reference field. It can also be paid by cash or cheque made out to 'Horndean and District U3A' and given to the Treasurer along with your Membership form.

Please read all the information on the back of this Membership Form and complete the Privacy Statement consent as well as the Gift Aid Declaration as appropriate.

Signed Date / /

Please give this form and subscription if paid by cash or cheque to the Treasurer.

Treasurer to complete

Member No Received / / Subs Paid..... / / Receipt No

Horndean & District U3A Membership Application Form 2018-19

Terms and Conditions of Membership

All members must:

- Abide by the Principles of the U3A movement.
- Act in the best interests of the U3A and never do anything to bring it into disrepute.
- Abide by the terms and conditions of the Constitution.
- Treat fellow members with respect and courtesy at all times.
- Comply with and support the decisions of the elected committee.
- Advise the committee of any change in your personal details.

Privacy Statement

Horndean and District U3A requires members to provide their personal information so that you can be kept informed about events and activities that are offered as part of your membership. Your information will be

- stored securely;
- used to communicate with you as a U3A member;
- shared with group conveners for those groups of which you are a member;
- used to send you information about the Third Age Trust to which all U3As are affiliated.

Please tick the box below to consent to your information being added to the direct mailing list for the Third Age Trust magazines: Third Age Matters and Sources. I consent to my data being shared with the company who oversee the distribution of the Third Age Trust magazines. (You can withdraw your consent at any time.)

Gift Aid Declaration

Horndean & District U3A can reclaim Gift Aid of 25p from every £1 you pay for the current Tax Year if you are able to complete this Declaration and tick the box:

I want to Gift Aid my subscription of £..... and any subscriptions I pay in the future or have paid in the past 4 years to Horndean & District U3A. I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my subscriptions and donations in that Tax Year it is my responsibility to pay any difference.

Signed Date / /

Please notify Horndean & District U3A if you

- want to cancel this declaration,
- change your name or home address, or
- no longer pay sufficient tax on your income and/or capital gains.

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid subscriptions and donations on your Self-Assessment tax return or ask HM Revenue and Customs to adjust your tax code.



2019-2020 APPLICATION for NEW SINGLE or JOINT MEMBERSHIP

Title and Full Name:.....

Known As : Mobile No.

.....
(How we will address you in emails etc)

Email:

Title and Full Name: (if joint application)

Known As : Mobile No.

Email:

Postal Address

..... Post Code Landline No.

N.B. To save costs, the committee will use email whenever possible

MEMBERSHIP FEES. The membership year of Waterlooville U3A is 1st April 2019 to 31st March 2020. Annual membership is £11 (single) or £20 (joint - two at same address). This includes a membership fee of £3.50 to our national organisation, the Third Age Trust, which provides a wide range of services & benefits. If you are already a FULL member of another U3A, the annual membership fee may be reduced providing you can supply proof of membership. Contact the Membership Secretary as below.

PAYMENT METHOD

- Cash (in person only)
- Cheque payable to Waterlooville U3A
- Bank Transfer paid on DD/MM/YY to Waterlooville U3A Sort Code: 55-70-34 Account No 80851177. Please quote 'NEW' followed by your surname for as many digits as allowed.

PRIVACY STATEMENT

Waterlooville U3A requires members to provide their personal information so that you can be kept informed about events and activities that are offered as part of your membership. In collecting your information WU3A will:

- Store it securely and handle it in compliance with the provisions of GDPR
- Use it to communicate with you as a U3A member

- Share your information with a mailing company that is contracted with us to protect said information in accordance with GDPR and to use that information solely to post our News Bulletin to your home
 - Send you general information about the Third Age Trust*
- *The Third Age Trust are the national office to which all U3As are affiliated.

Are you happy to be added to the direct mailing list for the Third Age Trust magazine – Third Age Matters, and for our News Bulletin? If so, **please tick the box below:**

I consent to my data being shared with the companies which oversee the distribution of the Trust Magazines and which distributes our News Bulletins

TERMS AND CONDITIONS OF MEMBERSHIP

All members must:

- Abide by the Principles of the U3A movement.
- Always act in the best interests of the U3A and never do anything to bring the U3A into disrepute.
- Abide by the terms and conditions of the constitution.
- Treat fellow members with respect and courtesy at all times.
- Comply with and support the decisions of the elected committee.
- Advise the committee of any change in your personal details.

I/We apply for membership of Waterloooville U3A and confirm that I/We will comply with the terms and conditions of membership as stated above.

Signed:

Dated:

GIFT AID DECLARATION. *Gift Aid is reclaimed by the charity from the tax you pay for the current tax year. Your address overleaf is used to identify you as a current UK taxpayer.*

In order to Gift Aid your donation you must tick the box below:

I want to Gift Aid my donation of £..... and any donations I make in the future or have made in the past 4 years to the charity, Waterloooville U3A – Reg. Charity 1116807

I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.

My Details:

Title..... First name or initial(s).....
Surname.....

Date.....

Please notify the charity if you a) want to cancel this declaration
b) change your name or home address

c) no longer pay sufficient tax on your income and /or capital gains

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self-Assessment tax return or ask HM Revenue and Customs to adjust your tax code.

Send completed form to: Membership Secretary, Claire Tame, 90 The Brow, Widley, Waterloooville, PO7 5DA



MEON VALLEY U3A

PRIVACY NOTICE

Introduction:

The General Data Protection regulations require Meon Valley U3A (MV U3A) to inform you that the personal data you give to us will be used by the MV U3A Secretary and the Treasurer to contact you from time to time with information which is relevant to your membership, such as your subscription, details relating to meetings, social events such educational visits and outings and, occasionally, other U3A centres' events which may be of interest.

Your personal data will be accessed by the Treasurer to manage subscriptions, and by the Summer Visits Organiser to contact participants and keep track of payments. It will also record your affiliation (if any) with an MV U3A study group. The data will not be shared with any third party.

If you should sign up for a U3A National Newsletter, the Third Age Trust will hold your name, U3A, and email under their Privacy Policy <https://u3a.org.uk/privacy-policy>.

Storing Data:

MV U3A will store your name, contact data (home address, phone/mobile number and email address, as appropriate), and any study group affiliation. Electronically-held data will be held within a password-protected and secure environment, accessible only to those committee members who require it to manage the MV U3A's affairs (ie: Secretary, Treasurer and Summer Visits Organiser). Study group leaders may also hold contact details of their group members, and must make their own arrangements to maintain the security of those details.

We will ask members to check and update their data on an annual basis. You may request a copy of information we hold about you and update or delete your data at any time by contacting the Secretary. MV U3A will keep personal data for no longer than 18 months after your membership has ended, unless you ask to remain on the circulation list for information about MV U3A events, in which case please let the Secretary know, or tick the box here

The MV U3A committee member responsible for ensuring compliance with the General Data Protection Regulations (the Data Controller) is the Treasurer, who should be contacted in the first instance if a member is not satisfied that their data has been held securely. You have the right to complain to the Information Commissioner's Office (Tel: 0303 123 1113) if you believe that MV U3A has misused your data.

Authorisation:

By completing and signing this form, you are agreeing that MV U3A may contact you in one or more of the ways indicated below. **Please tick all relevant boxes, as it may be important that you be contacted about event changes at short notice, for instance, due to inclement weather:**

Email:

Mail: **Postcode:**

SMS(text): **Telephone:**

Signature..... **Date**.....

Warsash U3A Membership Application

YOUR DETAILS

Name	
Email**	Telephone
Address	
Postcode	

**To reduce costs, the committee will communicate with you via email where possible.

MEMBERSHIP FEES

£25.00 annually

Or

If joining from the 1st July £15.00 This fee includes p
 services and benefits, including liability insurance cover r national organisation, the Third Age Trust, which
 If you are a member of another U3A the annual fee will
 £21.50. Membership fees are payable by (please tick on
 Bank transfer: Please contact the Membership
 Secretary through the website for account details. Cheque to: Warsash U3A
<https://u3asites.org.uk/warsash/contact>

TERMS AND CONDITIONS OF

MEMBERSHIP All members

must:

- Abide by the Principles of the U3A movement.
- Always act in the best interests of the U3A and never do anything to bring the U3A into disrepute.
- Abide by the terms and conditions of the constitution.
- Treat fellow members with respect and courtesy at all times.
- Comply with and support the decisions of the elected committee.
- Advise the committee of any change in your personal details.

I apply for membership of Warsash U3A and confirm that I will abide by the terms of membership as stated above. I confirm that I have completed the form myself. I will make full payment of fees due as soon as is reasonably practicable.	
Signed	Dated

PRIVACY STATEMENT

Warsash U3A requires members to provide their personal information so that you can be kept informed about events and activities that are offered as part of your membership. In collecting your information Warsash U3A will:

- Store it securely.
- Use it to communicate with you as a U3A member.
- Share your information with group leaders/conveners for those groups that you are a member of.
- Send you general information about the Third Age Trust.*

*The Third Age Trust are the national office to which all U3As are affiliated.

I consent to my data being used for the mailing of the 'Third Age Matters' and 'Sources' magazines; and shared with the company who oversee the distribution of the Trust Magazines.

If so, please tick the box:

Please be advised that you can request for your data not to be used for any of these purposes at any time by contacting the Membership Secretary as below.

If any of your personal data changes or should you wish to view your data, please contact the Membership Secretary.

Where to send this completed form: Email the Membership Secretary via the Website, <https://u3asites.org.uk/warsash/contact> who will give you details of where to send the form. Alternatively bring it to our monthly meeting on the second Friday of the month at Victory Hall, Warsash.

Please indicate how you came to find out about us:

- From our Website
- From a friend or relative
- From Advertising If so where seen.....

For internal use:

Received	Paid	Logged	Membership Number/s
----------	------	--------	---------------------

GIFT AID

If you are tax payer please complete the Charity Gift Aid Declaration.

Charity Gift Aid Declaration – multiple donation

Boost your donation by 25p of Gift Aid for every £1 you donate
--

Gift Aid is reclaimed by the charity from the tax you pay for the current tax year. Your address is needed to identify you as a current UK taxpayer.

In order to Gift Aid your donation you must tick the box below:

I want to Gift Aid my donation of £ 25 / £12.50 and any donations I make in the future or have made in the past 4 years to:

Name of Charity : WARSASH U3A

I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference. My Details

Title _____ First name or initial(s) _____

Surname _____

Full Home address _____

Postcode _____ Date _____

Please notify the charity if you:

- a. want to cancel this declaration
- b. change your name or home address
- c. no longer pay sufficient tax on your income and/or capital gains

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self-Assessment tax return or ask HM Revenue and Customs to adjust your tax code.