

Holme Valley u3a (hereafter 'HVu3a') treats your privacy rights seriously. This privacy policy sets out how we will deal with your 'personal information', that is, information that could identify, or is related to the identity of an individual.

1 WHAT PERSONAL INFORMATION DO WE COLLECT?

When you express an interest in becoming a member of HVu3a you will be asked to provide certain information. This includes:

- Your name.
- Your home address.
- Your e-mail address - *if you have one*.
- Your telephone number(s).
- Your subscription preferences.
- Emergency contact details - *if you wish us to have these*.

2 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 or online contact forms. At the point 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 in order to ensure our compliance with data protection legislation.

3 HOW DO WE USE YOUR PERSONAL INFORMATION?

We use your personal information:

- To provide HVu3a and National u3a activities and services to you.
- For the administration, planning and management of HVu3a.
- To communicate with you about group activities.
- To monitor, develop and improve the provision of HVu3a services and activities.

We will send you messages by email, other digital methods, telephone and post, as appropriate, to advise you of HVu3a activities.

4 WITH WHOM WE SHARE YOUR PERSONAL INFORMATION

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

- a. Internally - to committee members and group convenors, as required, to facilitate your participation in HVu3a activities.
- b. Externally - like many other u3as we use an external membership and Finance management system u3a Beacon that is provided to us and managed by Third Age Trust Trading Ltd (TATTL) and part of the National Third Age Trust. We also, with your consent use products and services such as those used for direct mailing of the Trust magazine (*Third Age Matters*).
- c. When we have a statutory duty to disclose it for legal or regulatory reasons.

Where we need to share your information outside of HVu3a, we will seek your permission and if permitted, inform you of the person or organisation with whom the information shared along with the details of their request.

We will not use your information nor share it with any other person or organisation other than for bona fide business relating to your HVu3a membership.

5 HOW LONG DO WE KEEP YOUR PERSONAL INFORMATION?

We need to keep your personal information so that we can provide our services to you. In most instances we will keep it until you formally cancel your membership or request we delete all or part of it. The exceptions to this are instances where there may be legal, financial or insurance issues requiring us to hold the information for longer. Where this applies, we will keep you informed during the period we keep the information and advise you of its eventual deletion.

If you *giftaid*, your membership fees, your information will be retained for 6 complete tax years in line with UK HMRC rules.

6 HOW YOUR INFORMATION CAN BE UPDATED OR CORRECTED

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:

Email: enquiries@holmevalleyu3a.org.uk

Telephone: **07548992144**

We will ask you to confirm the information we hold about you is correct at renewal time, each year.

You can request to view the information that HVu3a holds on you by contacting our membership secretary – contact details above. There may be circumstances where we are not able to comply with this request such as instances where it may contain references to another individual or because of legal, investigative or security reasons. In these circumstances, we will provide you with as much information as we are able. You can expect us to respond to requests to view the information we hold on you in less than 14 days however we are staffed purely by volunteers so there may be times when it will take a little longer.

Within legal bounds, you have the right to have part or all the information we hold about you, deleted. Should you want to do this then please request it through our membership secretary – contact details above. Be advised that deleting the information we hold on you may limit or remove our ability to provide some or all our services to you. In such circumstances we may be able to offer a work-around but if not, we will not be able to offer a reduction in membership subscription.

7 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 that creates a secure connection with your browser when registering or logging in to our online membership services.

Your membership information is held on an external membership management system that is provided and managed for us and many other u3as by the National Third Age Trust. Within HVu3a, this system is only accessed by those committee members with specific business need.

8 AVAILABILITY AND CHANGES TO THIS POLICY

This policy is available at:

www.u3asites.org.uk/holme-valley/docs/hvu3adataprivacypolicy21052023.pdf. This policy may change from time to time. If we make any material changes we will make you aware of this via the newsletter and the monthly members' meetings.

9 CONTACT

If you have any queries about this policy, need it in an alternative format, or have any complaints about our privacy practices, please contact: itsupport@holmevalleyu3a.org.uk

Data Privacy Policy

Document Change/Review History

Version	Date	Author/Reviewer	Reason
1.0	27/02/2018	HR Biggs	Final
1.0	12/02/2019	HR Biggs	Review
1.1	26/03/2021	HR Biggs	Review: section 4a updated to reflect change of Beacon owner to TATTL. Changed u3a branding and font
1.1	17/12/2023	HR Biggs	Reviewed
1.2	21/05/2023	HR Biggs	Reviewed: section 6 updated to remove reference to renewal form. Updated e-mail addresses and document link