

# Data Protection Policy

## Policy

### 1. Scope of the policy

This policy applies to the work of King's Lynn u3a. The policy sets out the requirements that King's Lynn u3a has to collect and process information for membership purposes. The policy details how personal information will be collected, stored and managed in line with data protection principles and the General Data Protection Regulation. The policy is reviewed on an ongoing basis by King's Lynn u3a committee members to ensure that King's Lynn u3a remains compliant.

### 2. Why this policy exists

This data protection policy ensures King's Lynn u3a:

- Complies with data protection law and follows good practice
- Protects the rights of members
- Is open about how it stores and processes members data
- Protects itself from the risks of a data breach

### 3. General guidelines for committee members and group convenors

- The only people able to access data covered by this policy should be those who need to communicate with or provide a service to King's Lynn u3a members.
- King's Lynn u3a will provide induction training to committee members and group convenors to help them understand their responsibilities when handling data.
- Committee Members and group convenors should keep all data secure, by taking sensible precautions and following the guidelines below.
- Strong passwords must be used, and they should never be shared.
- Data should not be shared outside of the u3a unless with prior consent and/or for specific and agreed reasons. Examples would include Gift Aid information provided to HMRC or information provided to the distribution company for the Trust publications.
- Member information should be refreshed periodically to ensure accuracy, via the membership renewal process or when policy is changed.
- Additional support will be available from the Third Age Trust where uncertainties or incidents regarding data protection arise.

### 4. Data protection principles

The General Data Protection Regulation identifies key data protection principles:

- Principle 1 - Personal data shall be processed lawfully, fairly and in a transparent manner
- Principle 2 - Personal data must be collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes; further processing for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes shall not be considered to be incompatible with the initial purposes.
- Principle 3 - The collection of personal data must be adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed;
- Principle 4 – Personal data held should be accurate and, where necessary, kept up to date; every reasonable step must be taken to ensure that personal data that are inaccurate, having regard to the purposes for which they are processed, are erased or rectified without delay;
- Principle 5 – Personal data must be kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for the which the personal data are processed; personal data may be stored for longer periods insofar as the personal data will be processed solely for archiving purposes in the public interest , scientific or historical research purposes or statistical purposes subject to implementation of the appropriate technical and organisational measures required by the GDPR in order to safeguard the rights and freedoms of individuals;.
- Principle 6 - Personal data must be processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures.

## **5. Lawful, fair and transparent data processing**

King's Lynn u3a requests personal information from potential members and members for membership applications and for sending communications regarding members' involvement with the u3a. Members will be informed as to why the information is being requested and what the information will be used for. The lawful basis for obtaining member information is due to the legitimate interest relationship that the u3a has with individual members. In addition, members will be asked to provide consent for specific processing purposes such as the taking of photographs King's Lynn u3a members will be informed as to who they need to contact should they wish for their data not to be used for specific purposes for which they have provided consent. Where these requests are received, they will be acted upon promptly and the member will be informed as to when the action has been taken.

## **6. Processed for specified, explicit and legitimate purposes**

Members will be informed as to how their information will be used and the Committee of King's Lynn u3a will seek to ensure that member information is not used inappropriately. Appropriate use of information provided by members will include:

- Communicating with members about King's Lynn u3a events and activities

- Group convenors communicating with group members about specific group activities
- Member information will be provided to the distribution company that sends out the Trust publication – Third Age Matters. Members will be informed and have a choice as to whether or not they wish to receive the publication.
- Sending members information about Third Age Trust events and activities
- Communicating with members about their membership and/or renewal of their membership
- Communicating with members about specific issues that may have arisen during the course of their membership

King's Lynn U3A will ensure that group convenors are made aware of what would be considered appropriate and inappropriate communication. Inappropriate communication would include sending u3a members marketing and/or promotional materials from external service providers.

King's Lynn u3a will ensure that members' information is managed in such a way as to not infringe an individual members rights which include:

- The right to be informed
- The right of access
- The right to rectification
- The right to erasure
- The right to restrict processing
- The right to data portability
- The right to object

## **7. Adequate, relevant and limited data processing**

Members of King's Lynn u3a will only be asked to provide information that is relevant for membership purposes. This will include:

- Name
- Postal address
- Email address
- Telephone number
- Gift Aid entitlement

Where additional information may be required such as health related information this will be obtained with the consent of the member who will be informed as to why this information is required and the purpose that it will be used for.

Where King's Lynn u3a organises a trip or activity that requires emergency contact information to be provided, a legitimate interest assessment will have been completed in

order to request this information. Members will be made aware that the assessment has been completed.

## **8. Photographs**

Photographs are classified as personal data. Where group photographs are being taken members will be asked to step out of shot if they don't wish to be in the photograph. Otherwise consent will be obtained from members in order for photographs to be taken and members will be informed as to where photographs will be displayed. Should a member wish at any time to remove their consent and to have their photograph removed then they should contact the Chairman to advise that they no longer wish their photograph to be displayed.

## **9. Accuracy of data and keeping data up-to-date**

King's Lynn u3a has a responsibility to ensure members' information is kept up to date. Members will be informed to let the membership secretary know if any of their personal information changes. In addition, on an annual basis, the membership renewal process will provide an opportunity for members to inform King's Lynn u3a as to any changes in their personal information.

## **10. Accountability and governance**

King's Lynn u3a Committee are responsible for ensuring that the u3a remains compliant with data protection requirements and can evidence this. Where consent is required for specific purposes then evidence of this consent (either electronic or paper) will be obtained and retained securely. King's Lynn u3a Committee will ensure that new members joining the Committee receive an induction into the requirements of GDPR and the implications for their role. King's Lynn u3a will also ensure that group convenors are made aware of their responsibilities in relation to the data they hold and process. Committee Members will stay up to date with guidance and practice within the u3a movement and will seek advice from the Third Age Trust National Office should any uncertainties arise. King's Lynn u3a Committee will review data protection requirements on an ongoing basis as well as reviewing who has access to date and how data is stored and deleted. When Committee Members and Group Convenors relinquish their roles, they will be asked to either pass on data to those who need it and/or delete data.

## **11. Secure Processing**

King's Lynn u3a Committee Members have a responsibility to ensure that data is both securely held and processed. This will include:

- Committee members using strong passwords
- Committee members not sharing passwords
- Restricting access of sharing member information to those on the Committee who need to communicate with members on a regular basis
- Using password protection on laptops and PCs that contain personal information
- Using password protection, a membership database or secure cloud systems when sharing data between committee members and/or group convenors
- UK u3a membership data is held on a secure independently managed database called Beacon. The Kings Lynn Beacon Administrator gives a level of

access to members depending on their role. All access is password protected. Access allows for management of the membership, communication and financial record keeping.

- When a Trustees leaves his/her role he/she is required to sign a form confirming that he/she has deleted from his/her IT equipment all u3a data/ correspondence relating to that role

## **12. Subject Access Request**

u3a members are entitled to request access to their own information that is held by King's Lynn u3a. The request needs to be received in the form of a written request to the Membership Secretary of King's Lynn u3a. On receipt of the request, the request will be formally acknowledged and dealt with expediently (the legislation requires that information should generally be provided within one month) unless there are exceptional circumstances as to why the request cannot be granted. King's Lynn u3a will provide a written response detailing all information held on the member. A record shall be kept of the date of the request and the date of the response.

## **13. Data Breach Notification**

Were a data breach to occur action will be taken to minimise the harm. This will include ensuring that all King's Lynn u3a Committee Members are made aware that a breach has taken place and how the breach occurred. The Committee shall then seek to rectify the cause of the breach as soon as possible to prevent any further breaches. The Chair of King's Lynn u3a will contact National Office as soon as possible after the breach has occurred to notify of the breach. A discussion will take place between the Chair and National Office as to the seriousness of the breach, action to be taken and, where necessary, the Information Commissioner's Office would be notified. The Committee shall also contact the relevant u3a members to inform them of the data breach and actions taken to resolve the breach.

Where a u3a member feels that there has been a breach by the u3a, a committee member will ask the member to provide an outline of the breach. If the initial contact is by telephone, the committee member will ask the u3a member to follow this up with an email or a letter detailing their concern. The alleged breach will then be investigated by members of the committee who are not in any way implicated in the breach. Where the committee needs support or if the breach is serious, they should notify National Office. The u3a member should also be informed that they can report their concerns to National Office if they don't feel satisfied with the response from the u3a. Breach matters will be subject to a full investigation, records will be kept and all those involved notified of the outcome.

# Appendix

# Privacy Policy

## 2. Introduction

### 2.1. Privacy

King's Lynn u3a treats your privacy rights seriously. This Privacy Policy sets out the basis on which we collect and use personal data about you.

### 2.2. Personal Data

In this Privacy Policy, where we use the words **personal data** we use these words to describe information that is about you and which identifies you.

### 2.3. In this Privacy Policy:

- 2.3.1. the word Trust means The Third Age Trust (charity number 288007)
- 2.3.2. the word TATTL means Third Age Trust Trading Limited (company number 11899419) and
- 2.3.3. the Beacon System means the membership data system operated by TATTL.

### 2.4. This Policy describes:

- 2.4.1. who is responsible for the personal data that we collect about you;
- 2.4.2. the personal data we collect about you;
- 2.4.3. how we will use it;
- 2.4.4. who we may disclose it to; and
- 2.4.5. your rights and choices in relation to your personal data.

This is to make sure you have a full picture of how we collect and use your personal data.

## 3. Who is responsible for the personal data that we collect?

We are the data controller for the purposes of data protection law, in respect of your personal data collected and used by us.

## 4. What personal data do we hold about you?

### 1. Collection and use

We collect and use personal data about you for the purpose of communicating with you as representative of your u3a. The personal data we hold includes:

## 4.1.1. Information that you provide to us / we collect from you

The information that you provide to us / we collect from you may include the following:

Type of Personal Data	Examples
<b>General</b>	
Contact information	When you become a member of King's Lynn u3a you will be asked to provide certain information. This includes: <ul style="list-style-type: none"> <li>• your name</li> <li>• home address</li> <li>• email address</li> <li>• telephone number</li> <li>• Gift Aid declaration</li> </ul>
<b>Marketing</b>	
Subscription Preferences	You will be asked if you wish to receive Third Age Matters
<b>Other</b>	

<p>Online activity information (to the extent that it constitutes personal data)</p>	<ul style="list-style-type: none"> <li>• <b>Technical information, through your internet browser or electronic device:</b> Certain information is collected by most websites or automatically through your electronic device, such as your IP address (i.e. your computer's address on the internet), screen resolution, operating system type (Windows or Mac) and version, internet browser type and version, electronic device manufacturer and model, language, time of the visit and pages visited.</li> <li>• <b>Technical information, using cookies and online tracking:</b> Cookies are pieces of information stored directly on the device you are using to access our Website. Cookies allow us to recognise your device and to collect information such as IP address, internet browser type, time spent using the Website and the pages visited.</li> </ul>
--	--

This information may be provided:

- (a) in the course of communications between you and us (including by phone, email or otherwise);

## 5. How do we use the personal data we collect about you?

### 5.1. Purposes

We use your personal data for a variety of different purposes during the course of us providing services to you. The purposes for which we use your personal data are set out below. Under data protection law, we can only use your personal data if we have a legal basis to do so. Examples of where we have a legal basis to process your personal data, includes when:



- 5.1.1. we have your **consent**;
- 5.1.2. it is necessary to enter into or perform a **contract** we have with you (or to take steps at your request prior to entering into that contract);
- 5.1.3. it is necessary to comply with a **legal obligation**; or
- 5.1.4. it is in our **legitimate interests** to process your personal data.

## 5.2. Legal Basis

We have set out our reasons for using your personal data in the table below under the heading **Legal Basis**. Where we rely on our legitimate interests, we have set out those interests in the table below.

Purpose	Legal Bases
To set up and manage your membership	Contract Legitimate interests
To manage membership information on the Beacon system	Contract Legitimate interests
To share with the Trust and TATTL to manage, develop and make improvements to the Beacon system	Legitimate interests
To administer, plan and manage our u3a	Legitimate interests
To monitor, develop and improve the provision of our u3a activity	Legitimate interests
To communicate with you about our u3a products, services, activities and events	Contract Legitimate interests
To communicate with you about Trust products, services, activities and events	Contract Legitimate interests
To deliver Trust publications including Third Age Matters	Contract Legitimate interests
To comply with any legal or regulatory obligations (including in connection with a court order)	Legal obligation
To enforce or apply the agreements concerning you (including agreements between you and us).	Contract Legitimate interests
To manage any issues, complaints, feedback and enquiries.	Consent Contract Legitimate interests

## 6. Automated processing

We do not use your personal data to make any automated decisions that might affect you.

- **Who may we disclose your Personal data to?**

### 6.1. We may share your personal data with:

6.1.1. the Third Age Trust and

6.1.2. Third Age Trust Trading Limited and

For more information please refer to Schedules 1 and 2.

### 6.2. We may also disclose your personal data to other third parties, for example:

where the welfare of a member is felt to be at risk we may share contact details with the appropriate authority. Please refer to the King's Lynn u3a Safeguarding Policy and Procedure.

## 7. How long will we keep your personal data?

### 7.1. Retention periods

Personal details will be retained for six years after the year your membership lapsed. This is because the member record generally forms part of our u3a's accounting records and is collected for any other legal obligation.

### 7.2. Extensions

Please note that the above retention period may be extended where we need to preserve and use personal data for the purposes of bringing or defending a legal claim. In such cases, we will continue to hold and process your personal data for as long as is necessary to deal with the legal proceedings.

## 8. Your rights

You have certain rights with respect to your personal data. The rights will only apply in certain circumstances and are subject to certain exemptions. Please see the table below for a summary of your rights. Details of who to contact to exercise these rights can be found in paragraph 14.

<b>Summary of your rights</b>	
<b>Right of access to your personal data</b>	You have the right to access a copy of your personal data that we hold about you and information about how we use it, subject to certain exemptions.

	<b>Summary of your rights</b>
<b>Right to rectify your personal data</b>	<p>You have the right to ask us to correct your personal data that we hold where it is incorrect or incomplete.</p> <p>To ensure the information we hold is accurate and up to date, member's need to inform the u3a as to any changes to their personal information. You can do this by contacting the membership secretary on our website or in person .</p> <p>On an annual basis you will have the opportunity to update your information, as required, via the membership renewal process. Should you wish to view the information that the u3a holds on you, you can make this request by contacting the membership secretary. 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 other individuals or for legal, investigative or security reasons. Otherwise we will usually respond within one month of the request being made.</p>
<b>Right to erasure of your personal data</b>	<p>You have the right to ask that your personal data be deleted in certain circumstances. For example:</p> <ul style="list-style-type: none"> <li>• where your personal data is no longer necessary in relation to the purposes for which it was collected or otherwise used;</li> <li>• if you withdraw your consent and there is no other legal ground for which we rely on for the continued use of your personal data;</li> <li>• if you object to the use of your personal data (as set out below);</li> <li>• if we have used your personal data unlawfully; or</li> <li>• if your personal data needs to be erased to comply with a legal obligation.</li> </ul>

	<b>Summary of your rights</b>
<b>Right to restrict the use of your personal data</b>	<p>You have the right to suspend our use of your personal data in certain circumstances. For example:</p> <ul style="list-style-type: none"> <li>• where you think your personal data is inaccurate but only for so long as is required for us to verify the accuracy of your personal data;</li> <li>• the use of your personal data is unlawful and you oppose the erasure of your personal data and request that it is suspended instead;</li> <li>• we no longer need your personal data, but your personal data is required by you for the establishment, exercise or defence of legal claims; or</li> <li>• you have objected to the use of your personal data and we are verifying whether our grounds for the use of your personal data override your objection.</li> </ul>
<b>Right to data portability</b>	<p>You have the right to obtain your personal data in a structured, commonly used and machine-readable format and for it to be transferred to another organisation, where it is technically feasible.</p> <p>The right only applies:</p> <ul style="list-style-type: none"> <li>• to personal data you provided to us;</li> <li>• where we rely on the following legal bases: <ul style="list-style-type: none"> <li>• consent; or</li> <li>• for the performance of a contract; and</li> </ul> </li> <li>• when the use of your personal data is carried out by automated (i.e. electronic) means.</li> </ul>
<b>Right to object to the use of your personal data</b>	<p>You have the right to object to the use of your personal data in certain circumstances and subject to certain exemptions. For example:</p> <ul style="list-style-type: none"> <li>• where you have grounds relating to your particular situation and we use your personal data for our legitimate interests</li> </ul>
<b>Right to withdraw consent</b>	<p>You have the right to withdraw your consent at any time where we rely on consent to use your personal data.</p>

	<b>Summary of your rights</b>
<b>Right to complain to the relevant data protection authority</b>	<p>You have the right to complain to the relevant data protection authority, which is in the case of us, the Information Commissioner's Office (<b>ICO</b>), where you think we have not used your personal data in accordance with data protection law. The ICO's contact details are:</p> <p>Information Commissioner's Office  Wycliffe House  Water Lane  Wilmslow  Cheshire  SK9 5AF</p>

## 9. Third party links

Our Website may include links to third-party websites, plug-ins and applications. Clicking on those links or enabling those connections may allow third parties to collect or share data about you. We do not control these third-party websites and are not responsible for how they handle your personal data. When you leave our Website, we encourage you to read the privacy notice of every website you visit.

## 10. Cookies

The Website currently does not use cookies.

## 11. Changes to our privacy policy

This Privacy Policy is available on the King's Lynn u3a website and from the Secretary on request. This policy may change from time to time. Members will be informed via the newsletter and the monthly meetings when any material changes are made to King's Lynn u3as policies and procedures.

**SCHEDULE 1****WHO IS PERSONAL DATA SHARED WITH?**

<b>Type of third party</b>	<b>Examples</b>
<b>General</b>	
Our professional advisers	Including accountants, lawyers and other professional advisers that assist us in carrying out our business activities.
Government authorities and third parties involved in court action	External agencies and organisations (including the police and other law enforcement agencies) for the purpose of complying with applicable legal and regulatory obligations.
<b>Law Enforcement and Regulation</b>	
Police and law enforcement agencies	We may share personal data with the police and other law enforcement agencies in connection with the prevention and detection of crime
Regulatory bodies	We may share personal data with third parties if we are under a duty to disclose or share your personal data in order to comply with any legal obligation or instructions of a regulatory body (including in connection with a court order), or in order to enforce or apply the terms of any agreements we have with or otherwise concerning you (including agreements between you and us) or to protect our rights, property or safety of our clients, employees or other third parties

## SCHEDULE 2

### OUR SERVICE PROVIDERS AND BUSINESS PARTNERS

<b>Name of third party</b>	<b>Purpose</b>
Third Age Trust	For Third Age Trust to provide membership support, advice and guidance
Third Age Trust Trading Limited	For Third Age Trust Trading Limited to provide various services