



# LEDBURY & DISTRICT u3a

## Ledbury & District u3a – Privacy Policy

Ledbury & District u3a Committee and Group Leaders (hereafter 'the u3a') treat its members' 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 apply to become a member of the u3a you will be asked to provide certain information. Your:

- Name – forename, surname, title, and (optionally) the name by which you like to be known
- Home address
- Email address (optional, but this is our preferred method of communication)
- Telephone numbers (landline and / or mobile)

### 2. Existing members:

- Your membership number, membership status, last payment method, Gift Aid date of confirmation (if applicable), any financial transactions which have gone through the Beacon Management System (if applicable), Interest Groups you belong to and other groupings relevant to managing our u3a.
- u3a Matters (national magazine) requirement (if applicable).
- Any official role undertaken and Beacon access rights granted (if applicable).
- Details of joint membership (if applicable).
- Details of associate membership (if applicable).

### 3. How do we collect this personal information?

All of the information collected is obtained directly from you. This is usually at the point of your initial registration. The information will be collected from 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 to use your data. Your consent is required to ensure our compliance with data protection legislation.

### 4. What is the data used for?

- Setting up, maintaining and verifying membership
- Providing and administering activities, events and meetings for our members
- Communication of u3a news and information. If an email address has been provided, it is assumed that it can be used for these purposes.
- Email addresses will NOT be used for other purposes.  
Being able to communicate with members by email keeps us efficient and reduces our costs.



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## 5. How do we use your personal information?

We use your personal information:

- To provide details of u3a activities 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 (when necessary) to advise you of u3a activities.

## 6. How long do we keep your personal information?

We need to keep your information so that we can provide our services to you. In most instances information about your membership will not be stored for longer than 12 months after your membership lapses. The exceptions to this are:

- The Membership Secretary keeps the membership database which forms part of our audit and also our Gift Aid Claim for the six years for which we are required to retain financial information
- There may be instances where there are legal or insurance circumstances which require information to be held for longer whilst they are investigated or resolved. Where this is the case, the member will be told how long the information will be held and when it is deleted.

## 7. Do we share or disclose 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 “u3a matters”. Where such systems are used, the Committee has scrutinised the Terms and Conditions of each supplier and judged that their digital and physical system(s) and procedure(s) are secure.
- If we have a statutory duty to disclose it for other legal and regulatory purposes (e.g. Gift Aid claims to HMRC). Where we need to share your information outside of our u3a, for example 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.

## 8. Third Party links

Our website may include links to third party websites, applications and plug-ins. 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.



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## 9. How your information can be updated, corrected or removed

To ensure that the information we hold is accurate and up-to-date, members need to inform Ledbury & District u3a of any changes to their personal information.

- This can be done by contacting the Membership Secretary at any time. The contact details are available on the website.
- 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 is held 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 instances where the information may contain references to another individual, or for legal, investigative or security reasons. Otherwise we will endeavour to respond within 21 days of the request being received.

## 10. How do we store your personal information?

Your personal information is stored securely on our instance of the Beacon Management System, which is the Third Age Trust management system for u3as. Committee members, authorised Officials and Group Leaders have access to the Beacon system at an access level appropriate to their role.

## 11. Queries and changes to our Privacy Policy

This privacy policy is available on the Ledbury & District u3a website. This policy may change from time to time. Members will be informed of any material changes through our normal communications..

If you have any queries about this policy, need it in an alternative format, or have any complaint about our privacy practices, please contact the Membership Secretary, whose contact details are available on the website.

## 12. Adoption and Review

This policy was adopted on: 05/09/2024

Policy review date: 04/09/2026