

PRIVACY POLICY

Preston and District u3a (hereafter 'the u3a') 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.

Payment of a membership fee creates a contractual relationship. This contract establishes a lawful basis to hold members' personal information.

This policy should be read in tandem with the u3a's Data Protection Policy.

WHAT PERSONAL INFORMATION DO WE COLLECT?

When you express an interest in becoming a member of the u3a you will be asked to provide certain information. This includes:

- Name.
- Home address.
- Email address.
- Telephone number.
- Communication preferences.
- Gift Aid Information

WHY 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 is collected via membership forms or online contact 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 use your data. Your consent is required in order to ensure our compliance with data protection legislation.

HOW DO WE USE YOUR PERSONAL INFORMATION?

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:

- we have your consent;
- 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);
- it is necessary to comply with a legal obligation; or
- it is in our legitimate interests to process your personal data.

We use your personal information:

- To provide u3a activities and services to you.
- For administration, planning and management of our u3a.

- To communicate with you about group activities.
- To monitor, develop and improve the provision of our u3a activities.

We'll send you messages by email, other digital methods, telephone and sometimes by post to advise you of u3a activities.

WHO DO WE SHARE YOUR PERSONAL INFORMATION WITH?

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

- Internally - to committee members and group leaders – as required to facilitate your participation in activities.
- Externally – with your consent for products or services such as direct mailing for the Trust magazines (*Third Age Matters* and *Sources*). Where such systems are used, the committee has scrutinised the Terms and Conditions of each supplier and judged that their digital and physical systems and procedures are secure.
- If we have a statutory duty to disclose it for other legal and regulatory reasons.

Where we need to share your information outside of the u3a we will seek your permission and inform you as to who the information will be shared with and for what purpose.

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 the 12 months of your membership and for a further three (3) months if you have not renewed. If you do not renew during this period your membership will cease and your details removed. The exceptions to this are instances where there may be legal or insurance circumstances that require information to be held for longer whilst this is investigated or resolved. Where this is the case then the member/s will be informed as to how long the information will be held for and when it is to be deleted.

See Appendix A for retention periods.

HOW YOUR INFORMATION CAN BE UPDATED OR CORRECTED

Members' personal data is held on the u3a Beacon Management System. This data can only be accessed by authorised users. You can access and amend your personal data via the members' portal

<https://u3abeacon.org.uk/u3aportal.php?u3a=232&sc=XTGQ>

There is a tick box "Hide contact details from group leaders". If you tick this box Group Leaders will still be able to email you, but your email address will not be displayed. **By ticking this only those with higher level of access rights will be able to view your personal details.**

You will need to contact the Membership secretary who will do this for you if you do not have internet access

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 password protection of locally stored files.

AVAILABILITY AND CHANGES TO THIS POLICY

This policy is available on the u3a website with Members only access and password protected. Please do not share this password with anyone and keep it safe and secure. This policy may change from time to time.

If we make any material changes we will make members aware of this via the newsletter and the monthly members' meetings.

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 us: Email: Secretary via the Website contact page.

Policy date April 2018
Reviewed and Updated April 2021
Next review due April 2024

Retention Periods

Description	Who Maintains	How Long Held	Why Held
Membership Forms	Membership Secretary	1 year plus current year	Membership queries & Gift Aid
Membership Database	Membership Secretary	6 years plus current year	HMRC Regulation
Third Age Matters	Membership Secretary	Ongoing	Changed when members join/leave or change option to receive TAM
Attendance Sheets	Admin	1 Year plus current year	To support accounts and In case of queries i.e. incidents
Visitors Record	New Members Representative	6 months	Monitor how many times they visit. If they continue to visit they will no longer be able to attend without becoming a member
Website Editors Passwords	Website Administrator	Ongoing	Changed when editors added/deleted or change any of their contact details
Annual list of walks	Walking Group Leader	Current year	Members Information