

Recording, Usage & Protection of Data

1. Recording of Data

1.1 Subscription Form

Membership data is obtained from details submitted on an annual subscription form, although this information may be carried forward from the previous year's membership for renewing members whose details are unchanged.

The details recorded consist of the member's name and preferred title, full postal address, and (where provided) telephone number and email address. Additionally, if the member gives permission for Torbay u3a to reclaim tax on the subscription, a Gift Aid indicator is recorded. If membership is continued from previous years, that will also be noted.

Where two or more members share the same address, an indicator will be set on each member's record to show that mailings may be shared (see below, use of data).

Subscription forms are filed alphabetically and stored by the Membership Secretary.

1.2 PayPal

Members can opt to use the PayPal link on the Torbay u3a website to pay for their subscription, in which case they do not need to complete a subscription form. The same information that is recorded on the subscription form is submitted to PayPal together with the appropriate payment. Once the fee has been processed by PayPal, they send an email to the treasurer and the membership secretary so the payment can be recorded, and the membership spreadsheet can be updated.

1.3 Membership Spreadsheet

The details extracted from the form are stored on an Excel spreadsheet, access to which is password protected. To provide additional security, the spreadsheet is stored in the cloud and backed-up at least monthly.

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2. Usage & Protection of Data

2.1 Communication

The data is used primarily to facilitate communication with members, providing information through whichever means is most appropriate and/or available. For preference, contact is by electronic mail. Communications include a monthly Newsletter, occasional information about special events, subscription renewal information. The data may not be used to communicate with members to advertise or promote any commercial activities, except relating to specific initiatives of Torbay u3a.

2.2 Third Age Matters

A file of members' addresses (modified to reflect shared addresses) is sent periodically to the publishers of the Third Age Trust magazine "Age Matters" for direct mailing purposes.

Data submitted to the publishers is not used for any other purpose, and no member details may be shared with any other third party under any circumstances without explicit permission.

The Membership Secretary is responsible for extracting capitation figures for submission to the Third Age Trust (no personal information at all is provided).

2.3 Gift Aid

Details must also be provided to enable the Treasurer to document claims for reimbursement of tax through Gift Aid – this information is supplied to HMRC on a preformatted spreadsheet, giving name and address data extracted from our computer file.

2.4 Newsletter

In order to facilitate communication and distribution of the Newsletter, designated members of the Torbay u3a Committee may be given access to a copy of the address information in the membership database in a computer file, which is used to produce a distribution list. The file held by the Membership Secretary remains the only authorised full record. In order to

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maintain accuracy and consistency, changes to the mailing file should be made only as agreed with the Membership Secretary.

Any other access to the full membership database is restricted to Committee members only and is then provided in PDF format (not editable or accessible for processing). Printing of hard copies is strongly discouraged and long-term retention of either hard copy or PDF copy is not allowed.

Telephone numbers for Group Leaders are available to all members through the Newsletter, and email addresses for Committee Members are also published in the Newsletter, on the noticeboard at monthly meetings, and in some cases on the Torbay u3a Website. Permission for this disclosure is confirmed through a Contact Agreement.

Contact information of members providing contributions to the Newsletter is not recorded therein unless written permission has been obtained through a Contact Agreement.

2.5 Membership Enquiries

Enquiries requesting information regarding the address, telephone number, or email address of a member as recorded on the membership list must be referred to the Membership Secretary only, and the enquirer's details will be noted and passed to the member who may (if they wish) then contact the enquirer directly.

2.6 Changes and Deletions

All changes and deletions are separately recorded in a change log, which shows the date of change, source of the information, and records both "before" and "after". This is to provide an audit trail of changes to the main database during the current year.

Changes, once recorded in the change log, are made directly to the main file and also to the file ready to be supplied to the publishers of "Age Matters" at the next update (see above). Both changes and deletions are also copied to the Committee Member(s) responsible for Newsletter distribution.

Deletions, once recorded in the Change Log, are removed entirely from the current membership list, distribution list and the publishers list.

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The change log will also be used to reinstate deletions made from the active membership list during the preceding year reflecting death / resignation / expulsion, so that the archived file presents an accurate capitation and Gift Aid record.

2.7 Archiving and Destruction of Data

Data is kept only as long as is necessary and relevant.

At the commencement of a new membership year, the previous year's file will be marked as archive and become inactive except to facilitate any subscription reminders and late renewals of lapsed members, and to enable accurate capitation counts to be made. This archived file will be kept for 1 year.

At the end of 1 year the archived file will be edited by permanent removal of all entries not flagged for Gift Aid and will then be kept for a further 7 years to accord with HMRC regulations; after that period, it will be deleted.

When entries on the computer file are removed, the corresponding paper forms will also be shredded at the same time.

Date last updated: 08/12/2022

Approved by Torbay u3a Committee: 06/04/2023

Next Review Date: 06/04/2026