



## Caldicot u3a - Privacy Policy

### 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 and title and (if you wish) the name by which you like to be known
- Home address
- Email address (optional but our preferred method of communication)  Phone 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 & Sources (national magazines) requirement when applicable.
- Any Official role and Beacon access rights granted (if applicable)
- Details of joint membership (if applicable)
- Detail of associate membership (if applicable)

### 3. 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. 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 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.
- Communicating u3a news and updates. If an e-mail address has been provided, it is assumed that it can be used for these purposes.
- E-mail addresses will NOT be used for other purposes.

N.B. Being able to communicate with members by e-mail keeps us efficient and keeps our costs down.

### 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. 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 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 (e.g. Gift Aid claims to HMRC). Where we need to share your information outside the u3a, e.g. 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.

7. How your Information can be updated, corrected or removed

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 at any time. 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 the u3a holds on you, you can make this request by contacting the Membership Secretary – as detailed above.

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 another individual or for legal, investigative or security reasons. Otherwise we will usually respond within 14 working days of the request being made.

8. 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 relevant to their role.