

Privacy

Context

Settle District U3A Privacy Policy

Settle District U3A (sdu3a) treats members' privacy rights seriously. This privacy policy sets out how it will deal with members' personal information, that is, information that could identify, or is related to the identity of, an individual.

What personal information does Settle District U3A (sdu3a) collect?

On joining Settle District U3A (sdu3a) members will be asked to provide certain information. This includes name, home address, email address, telephone numbers, emergency contacts, subscription preferences for Third Age Matters and Gift Aid eligibility. This information will be collected via membership forms or online contact forms. The lawful basis for collecting and storing this information is based on the legitimate interest that Settle District U3A (sdu3a) has in communicating with its members in order to inform them about the groups, activities and events that they can access as a member. This includes:

- providing U3A activities and services and communicating information about group activities
- helping with the administration, planning and management of Settle District U3A (sdu3a)
- facilitating the monitoring, development and improvement of Settle District U3A (sdu3a) activities
- delivering the Trust publication – Third Age Matters
- applying for Gift Aid from HMRC

Messages will be sent by email and other digital methods as the preferred option but by post, hand delivered or by telephone if members do not have an email address.

With whom does Settle District U3 (sdu3a) share personal information?

Settle District U3A (sdu3a) may disclose personal information

- internally – to committee members and group leaders – as required to facilitate members' participation in U3A activities
- externally – for direct mailing of the Trust magazine – Third Age Matters. The magazine is distributed by a third party processor and information is shared with the distribution company via a secure online portal. Members may opt out by logging into their membership record on Beacon and changing their preference or by contacting the Membership Secretary
- externally – to share with the Third Age Trust (charity number 288007) and Third Age Trust Trading Limited (company no. 11899419) (TATTL) to manage, develop and make improvements to the membership data system known as 'Beacon' which is operated by TATTL
- if Settle District U3A (sdu3a) has a statutory duty to disclose personal information for legal and/or regulatory reasons. In this instance consent will be sought from the members involved. Information will only be shared without consent where there are serious safety concerns and it was felt to be in the members or the Settle District U3A's (sdu3a) best interests to disclose it
- for the purposes of claiming Gift Aid from HMRC

How long is personal information kept for?

Personal information is normally deleted or destroyed when a

person ceases to be a member of Settle District U3A (sdu3a). However, as a Charity and a Gift Aid claimant Settle District U3A (sdu3a) is required to keep some personal information for up to seven years. The exceptions to this are instances where there may be financial, legal or insurance circumstances that require information to be held for longer whilst the issues are investigated or resolved. Where this is the case members will be informed as to how long the information will be held for and when it is deleted.

How personal information can be updated or corrected

Settle District U3A (sdu3a) will make every effort to ensure that the personal information it holds is accurate and up to date. If a member's personal information changes (new address, phone number, emergency contact etc) they should access and amend their personal information through the home page on Settle District U3A's (sdu3a) website or via the 'Membership' tab and then the Beacon for existing members' tab. Members who cannot access their data in this way, must contact the Membership Secretary in writing with the required modifications or to view the information that Settle District U3A (sdu3a) holds. There may be certain circumstances where Settle District U3A (sdu3a) is 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 Settle District U3A (sdu3a) will usually respond within one month of the request being made.

How is personal information stored?

Settle District U3A (sdu3a) has in place a range of security safeguards to protect personal information against loss or theft, as well as unauthorised access, disclosure, copying, use or modification. Security measures include the use of a management database system (Beacon). Membership information is held securely and is only accessed by Committee Members and Group Leaders – as appropriate.

Availability and changes to this policy

This policy will be reviewed annually by the Committee. It is available on the Settle District U3A (sdu3a) website or by contacting a Committee member. This policy may change from time to time. Members will be informed via the newsletter and/or the monthly meetings when any material changes are made to Settle District U3A's (sdu3a) policies and procedures. Members should contact any member of the Committee if they have any queries about this policy, need it in an alternative format, or have any complaints about our privacy practices.

Date of next review

November 2024