

Data Protection Policy

Category: Keeping it Legal

1. Introduction

This sets out the Tarporley & District U3A Data Protection Policy.

2. Policy

2.1 Scope of the policy

This policy applies to the work of Tarporley & District u3a. The policy sets out the requirements that Tarporley & District u3a will follow in order to collect and process information for membership purposes. The policy details how personal information will be collected, stored and managed in line with data protection principles and the General Data Protection Regulation. The policy is reviewed on an ongoing basis by Tarporley & District u3a committee members to ensure that Tarporley & District u3a remains compliant.

2.2 Why this policy exists

This data protection policy ensures Tarporley & District u3a:

- Complies with data protection law and follows good practice
- Protects the rights of members
- Is open about how it stores and processes members' data
- Protects itself from the risks of a data breach

2.3 General guidelines for committee members and group convenors

- The only people able to access data covered by this policy should be those who need to communicate with or provide a service to Tarporley & District u3a members.
- Tarporley & District u3a will provide induction training to committee members and group convenors to help them understand their responsibilities when handling data.
- Committee Members and group convenors should keep all data secure, by taking sensible precautions and following the guidelines below.
- Strong passwords must be used, and they should never be shared.
- Data should not be shared outside of the u3a unless with prior consent and/or for specific and agreed reasons. Examples would include Gift Aid information provided to HMRC or information provided to the distribution company for the Trust publications.
- Member information should be refreshed periodically to ensure accuracy, via the membership renewal process or when policy is changed.
- Additional support will be available from the Third Age Trust where uncertainties or incidents regarding data protection arise.



2.4 Data protection principles

The General Data Protection Regulation identifies key data protection principles:

- Principle 1 - Personal data shall be processed lawfully, fairly and in a transparent manner.
- Principle 2 - Personal data must be collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes; further processing for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes shall not be considered to be incompatible with the initial purposes.
- Principle 3 - The collection of personal data must be adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed.
- Principle 4 – Personal data held should be accurate and, where necessary, kept up to date; every reasonable step must be taken to ensure that personal data that are inaccurate, having regard to the purposes for which they are processed, are erased or rectified without delay.
- Principle 5 – Personal data must kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for the which the personal data are processed; personal data may be stored for longer periods insofar as the personal data will be processed solely for archiving purposes in the public interest , scientific or historical research purposes or statistical purposes subject to implementation of the appropriate technical and organisational measures required by the GDPR in order to safeguard the rights and freedoms of individuals.
- Principle 6 - Personal data must be processed in accordance a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures.

2.5 Lawful, fair and transparent data processing

Applicants for membership of Tarporley & District u3a are informed as to the purposes for which we collect and use their personal data and are required to indicate their consent to the use of their data for those purposes. That written consent forms the lawful basis for our use of members' personal data. In addition, members may from time to time be asked to provide consent for specific processing purposes, such as the taking of photographs. Members should contact the Secretary of Tarporley & District u3a should they wish their data not to be used for one or more specific purposes. Where these requests are received, they will be acted upon promptly and the member will be informed as to when the action has been taken.

2.6 Processed for specified legitimate purposes

Members' personal data is to be used only for specified legitimate purposes:

- Communicating with members about Tarporley & District u3a events and activities
- Group convenors communicating with group members about specific group activities

- Member information will be provided to the distribution company that sends out the Trust publication – “u3a Matters” – where the member has indicated their consent on their membership application form. Members may request to be added to the distribution list for u3a Matters by contacting the Membership Secretary.
- Sending members information about Third Age Trust events and activities
- Communicating with members about their membership and/or renewal of their membership
- Communicating with members about specific issues that may have arisen during their membership.

Tarporley & District u3a will ensure that group convenors are made aware of what would be considered appropriate and inappropriate communication. Inappropriate communication would include sending u3a members marketing and/or promotional materials from external service providers without members’ prior consent.

Tarporley & District u3a will ensure that members' information is managed in such a way as to not infringe an individual member’s rights. These are summarised in the table below.

	Summary of your rights
Right of access to your personal data	You have the right to receive a copy of the personal data that we hold about you and information about how we use it. Should you wish to view the information that the u3a holds on you, you can make this request by contacting the membership secretary. We will usually respond within one month of the request being made.
Right to rectify your personal data	You have the right to ask us to correct your personal data where it is incorrect or incomplete. To ensure the information we hold is accurate and up to date, members should contact the membership secretary with any changes that are necessary. On an annual basis you will have the opportunity to update your information, as required, via the membership renewal process.
Right to erasure of your personal data	You have the right to ask that your personal data be deleted in certain circumstances. For example: <ul style="list-style-type: none"> • where your personal data is no longer necessary in relation to the purposes for which it was collected or otherwise used; • if you withdraw your consent and there is no other legal ground for our continued use of your personal data; • if you object to the use of your personal data (as set out



	Summary of your rights
	<p>below);</p> <ul style="list-style-type: none"> • if we have used your personal data unlawfully; or • if your personal data needs to be erased to comply with a legal obligation.
Right to restrict the use of your personal data	<p>You have the right to suspend our use of your personal data in certain circumstances. For example, where:</p> <ul style="list-style-type: none"> • you think your personal data is inaccurate, but only for so long as is required for us to verify the accuracy of your personal data; • our continued use of your personal data is unlawful, and you oppose the erasure of your personal data and request that it is suspended instead; • we no longer need your personal data, but your personal data is required by you for the establishment, exercise or defence of legal claims; or • you have objected to the use of your personal data and we are verifying whether our grounds for the use of your personal data override your objection.
Right to data portability	<p>You have the right to obtain your personal data in a structured, commonly used and machine-readable format and for it to be transferred to another organisation, where it is technically feasible.</p> <p>The right only applies:</p> <ul style="list-style-type: none"> • to personal data you provided to us; • where we rely on the following legal bases: <ul style="list-style-type: none"> • consent; or • for the performance of a contract; and • when the use of your personal data is carried out by automated (i.e. electronic) means.
Right to object to the use of your personal data	<p>You have the right to object to the use of your personal data in certain circumstances and subject to certain exemptions. For example:</p> <ul style="list-style-type: none"> • where you have grounds relating to your particular situation and we use your personal data for our legitimate interests (or those of a third party); • if you object to the use of your personal data for direct marketing



	Summary of your rights
	<p>purposes; and</p> <ul style="list-style-type: none"> where we use your personal data to take a decision which is based solely on automated processing where that decision produces a legal effect or otherwise significantly affects you.
Right to withdraw consent	You have the right to withdraw your consent at any time where we rely on consent to use your personal data.
Right to complain to the relevant data protection authority	<p>You have the right to complain to the Information Commissioner's Office (ICO), where you think we have not used your personal data in accordance with data protection law. The ICO's contact details are:</p> <p>Information Commissioner's Office Wycliffe House Water Lane Wilmslow Cheshire SK9 5AF</p>

2.7 Adequate, Relevant and Limited Data Processing

Members of Tarporley & District u3a will only be asked to provide information that is relevant for membership purposes. This will include:

- Name
- Postal address
- Email address
- Telephone number
- Gift Aid entitlement

Where additional information may be required, such as health-related information where this is relevant to trips or activities, this will be obtained with the consent of the member who will be informed as to why this information is required and the purpose that it will be used for.

Where Tarporley & District u3a organises a trip or activity that requires next of kin information to be provided, a legitimate interest assessment will have been completed in order to request this information. Members will be made aware that the assessment has been completed.

2.8 Photographs

Photographs in which individuals are identifiable are classified as personal data. Where group photographs are being taken, members will be asked to step out of shot if they don't wish to be in the photograph. Otherwise, consent will be obtained from members for photographs to be taken and members will be informed as to where photographs will be displayed. Should a member wish at any time to remove their consent

and to have their photograph removed then they should contact the relevant person (e.g. the secretary, a Group Leader or the Newsletter editor) to advise that they no longer wish their photograph to be displayed.

2.9 Accuracy of data and keeping data up-to-date

Tarporley & District u3a has a responsibility to ensure members' information is kept up to date. Members should let the membership secretary know if any of their personal information changes. In addition, on an annual basis, the membership renewal process will provide an opportunity for members to inform Tarporley & District u3a as to any changes in their personal information.

2.10 Retention periods

Your personal data will normally be deleted from our records no later than one year after you cease for whatever reason to be a member of Tarporley & District u3a. An exception is any data we hold in relation to your agreement to have Gift Aid applied to your subscription which we are required to hold for six years after the relevant subscription year.

2.11 Disclosure to third parties

Your personal data will not normally be shared with any third party other than –

- H.M. Revenue & Customs in relation to the Gift Aid scheme
- The Third Age Trust and/or Third Age Trust Trading Limited insofar as that is necessary in connection with issues arising in connection with the functioning of the Beacon membership administration system
- The distributor of “u3a Matters” magazine, where you consent to your data being shared to receive the magazine.

2.12 Accountability and governance

Tarporley & District u3a Committee is responsible for ensuring that the u3a remains compliant with data protection requirements and can evidence that it has. Where consent is

required for specific purposes then evidence of this consent (either electronic or paper) will be obtained and retained securely. Tarporley & District u3a Committee will ensure that new members joining the Committee receive an induction into the requirements of GDPR and the implications for their role. Tarporley & District u3a will also ensure that group convenors are made aware of their responsibilities in relation to the data they hold and process. Committee Members will stay up to date with guidance and practice within the u3a movement and will seek advice from the Third Age Trust National Office should any uncertainties arise. Tarporley & District u3a Committee will review data protection requirements on an ongoing basis as well as reviewing who has access to data and how data is stored and deleted. When Committee Members and Group Convenors relinquish their roles, they will be asked to either pass on data to those who need it and/or delete data.

2.13 Secure Processing

Tarporley & District Committee Members have a responsibility to ensure that data is both securely held and processed. This will include:

- Committee members and convenors using strong password protection on laptops and PCs that contain members' personal information;
- Committee members and convenors not sharing passwords with third parties;
- Restricting access to member information to those who need to communicate with members on a regular basis;
- Ensuring members' permission is obtained for sharing relevant contact details where a Committee or interest group matter is discussed via email or message app (e.g. WhatsApp).

2.14 Subject Access Request

u3a members are entitled to request access to the information that is held by Tarporley & District u3a about them as individuals. The request needs to be received in the form of a written request to the Membership Secretary of Tarporley & District u3a. On receipt of the request, the request will be formally acknowledged and dealt with expediently (the legislation requires that information should generally be provided within one month) unless there are exceptional circumstances as to why the request cannot be granted. Tarporley & District u3a will provide a written response detailing all information held on the member. A record shall be kept of the date of the request and the date of the response.

2.15 Data Breach Notification

Were a data breach to occur, action will be taken to minimise the harm. This will include ensuring that all Tarporley & District u3a Committee Members are made aware that a breach has taken place and how the breach occurred. The Committee shall then seek to rectify the cause of the breach as soon as possible to prevent any further breaches. The Chair of Tarporley & District u3a will contact National Office as soon as possible after the breach has occurred to notify the breach. A discussion will take place between the Chair and National Office as to the seriousness of the breach, action to be taken and, where necessary, the Information Commissioner's Office would be notified. The Committee shall also contact the relevant u3a members to inform them of the data breach and actions taken to resolve the breach.

Where a u3a member feels that there has been a breach by the u3a, a Committee member will ask the member to provide an outline of the breach. If the initial contact is by telephone, the Committee member will ask the u3a member to follow this up with an email or a letter detailing their concern. The alleged breach will then be investigated by members of the Committee who are not in any way implicated in the breach. Where the Committee needs support or if the breach is serious, they should notify National Office. The u3a member should also be informed that they can report their concerns to National Office if they don't feel satisfied with the response from the u3a. Complaints of a data breach will be subject to a full investigation, records will be kept and all those involved notified of the outcome.



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