



DATA PROTECTION and PRIVACY POLICY

1. Statement

Where Bu3a is used it refers to Bakewell Area u3a.

The Bakewell Area u3a Committee is the data controller for the purposes of data protection law, in respect of your personal data collected and used by us.

This policy describes:

- Who is responsible for the personal data that we collect
- The nature of personal data we collect
- How we will use it
- Who we may disclose it to
- Members rights and choices in relation to personal data.

2. Aims

This data protection policy ensures Bakewell Area 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

3. General guidelines for committee members and group coordinators

- The only people able to access data covered by this policy should be those who need to communicate with, or provide a service to, Bu3a members.
- Data should not otherwise be shared, either informally or outside Bu3a.
- Bu3a will attempt to provide guidance to committee members and group coordinators to help them understand their responsibilities when handling data.
- Committee Members and group coordinators should keep all data secure, by taking sensible precautions and following the guidelines below.
- Group coordinators will use Beacon if possible to communicate with their members and where this is not practical, will delete data from their devices on passing the role to someone else.
- Strong passwords must be used, and they should never be shared.
- Data should not be shared outside Bakewell Area 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.

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 be kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for 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 organizational measures required by the GDPR in order to safeguard the rights and freedoms of individuals;
- Principle 6 - Personal data must be processed in a manner that ensures appropriate security of the personal data, including protection against unauthorized or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organizational measures.

5. Lawful, fair and transparent data processing

Bu3a requests personal information from potential members and members for membership applications and for sending communications regarding their involvement with the u3a.

The lawful basis for obtaining member information is due to the ***legitimate interest*** relationship that the u3a has with individual members. Members will be informed as to why the information is being requested, and what the information will be used for. Members will be asked to provide verbal consent for their data to be held, and a record of this consent will be securely held along with their member information. In addition, members will be asked to provide consent for specific processing purposes such as the taking of photographs. Bu3a members will be informed as to who they

need to contact should they wish for their data not to be used for specific purposes for which they have provided consent. Where these requests are received, they will be acted upon promptly and the member will be informed when the action has been taken.

6. Processed for specified, explicit and legitimate purposes

Members will be informed as to how their information will be used, and the Committee of Bu3a will seek to ensure that member information is not used inappropriately. Appropriate use of information provided by members will include:

- Communicating with members about Bu3a events and activities
- Communicating with members about other area u3a activities
- Group coordinators communicating with group members about specific group activities
- Member information will be provided to the distribution company that sends out the Trust publication – Third Age Matters. Members will be informed and have a choice as to whether or not they wish to receive the publication.
- 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 the course of their membership

Bu3a will ensure that group coordinators 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.

Bu3a will ensure that members' information is managed in such a way as to not infringe an individual members rights which include:

- The right to be informed
- The right of access
- The right to rectification
- The right to erasure
- The right to restrict processing
- The right to object

7. Adequate, relevant and limited data processing

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

- Name
- Postal address
- Email address
- Telephone number(s)
- Gift Aid declaration

Where additional information may be required (such as health related information), 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 Bakewell Area u3a organizes a trip or activity that requires next of kin information to be provided, a legitimate interest assessment will be completed prior to requesting this information. Members will be made aware that the assessment has been completed.

8. Sharing of Personal Data

We use personal data for a variety of different purposes during the course of providing services to members. The purposes for which we can share personal data are set out below. Under data protection law, we can only use 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 **consent**;
- It is necessary to enter into or perform a **contract** we have with members
- It is necessary to comply with a **legal obligation**
- It is in our **legitimate interests** to process your personal data.

We may share your personal data with:

- The Third Age Trust and Third Age Trust Trading Limited
- Our service providers and business partners, including accountants, lawyers and other professional advisers that assist us in carrying out our business activities.
- If we are under a duty to disclose or share your personal data in order to comply with any legal obligation, including police or court orders.

9. Photographs

Photographs 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 in order 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 a Bakewell Area u3a Committee member to advise that they no longer wish their photograph to be displayed.

10. Accuracy of data and keeping data up-to-date

Bakewell Area u3a has a responsibility to ensure members' information is kept up to date. Members will be asked to let the Membership Secretary know if any of their personal information changes via membership@Bakewellareau3a.org.uk. In addition, on an annual basis the membership renewal process will provide an opportunity for members to inform Bakewell Area u3a of any changes in their personal information.

11. Accountability and governance

- Bakewell Area u3a Committee are 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.

- New members joining the Committee receive an induction into the requirements of GDPR and the implications for their role. Bu3a will also ensure that group coordinators 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.
- Bakewell Area u3a Committee will review data protection requirements on an ongoing basis, as well as reviewing who has access to date and how data is stored and deleted. When Committee Members and Group Coordinators relinquish their roles, they will be asked to either pass on data to those who need it and/or delete data.

12. **Secure Processing**

- Bakewell Area u3a Committee Members have a responsibility to ensure that data is both securely held and processed. This will include:
- Committee members using strong passwords
- Committee members not sharing passwords
- Restricting access of sharing member information to those on the Committee who need to communicate with members on a regular basis
- Using password protection on laptops and PCs that contain personal information
- Using password protection, a membership database or secure cloud systems when sharing data between committee members and/or group conveners

13. **Subject Access Request**

Members are entitled to request access to the information that is held by Bakewell Area u3a.

The request needs to be received in the form of a written request to the Membership Secretary of Bu3a. 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. Bakewell Area 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.

14. **Data Breach Notification**

Should a data breach occur, action will be taken to minimise the harm. This will include ensuring that all Bakewell Area u3a Committee Members are made aware that a data 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 Bakewell Area u3a will contact National Office as soon as possible after the breach has occurred to notify of 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

member(s) to inform them of the data breach, and the actions taken to resolve the breach.

Where a Bu3a member feels that there has been a data breach, 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 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 the National Office. The member should also be informed that they can report their concerns to the National Office if they don't feel satisfied with the response from the Bakewell Area u3a. Data breach matters will be subject to a full investigation, records will be kept and all those involved notified of the outcome.

15. Storage and deletion of member records

Person to perform actions below - Membership Secretary

1. Deletion of paper application forms of current members

Paper application forms of current members which have been added to Beacon will be shredded at the end of the financial year in which they were received. Paper Gift Aid forms (where applicable) will be retained for 6 years following cessation of membership, as per section 2a below.

2. On the resignation or death of a member

- the member record on Beacon will be updated to reflect the changed member status
- the email address and mobile telephone number will be deleted
- the 'Hide contact details from group leaders' box on Beacon will be checked
- The Membership Secretary will inform the Group Liaison Officer, who will inform relevant group leaders

In addition -

- a) Resigned/deceased members registered for Gift Aid - paper Gift Aid forms, and member records on the Beacon database, will be kept for 6 years following cessation of membership. Paper forms will be shredded after this. The member record on Beacon will be deleted.
- b) Resigned/deceased members not registered for Gift Aid - member records on the Beacon database will be deleted at the end of the financial year.

3. Lapsed members

- For any given membership year, a member will be deemed as 'Lapsed' if their subscription has not been received by 30th March
- Process to be followed as per section 2 above for resignation or death of a member, initially marking status as 'Lapsed' on Beacon, and then deleting records as detailed in Section 2.
- Should a lapsed member wish to rejoin later in the current financial year, their original membership will be reinstated on provision of their current details.