

Privacy Policy

Lancaster & Morecambe u3a (L&Mu3a) treats your privacy rights seriously. This privacy policy sets out how we will deal with your 'personal information', that is, information that could identify, or is related to the identity of, an individual.

In this Privacy Policy:

- the word Trust means The Third Age Trust (charity number 288007);
- the word TATTL means Third Age Trust Trading Limited (company number 11899419); and
- the Beacon System means the membership data system operated by TATTL.

Who is responsible for the personal data that we collect?

We are the data controller for the purposes of data protection law, in respect of your personal data collected and used by us.

What personal information do we collect?

When you express an interest in becoming a member of the u3a you will be asked to provide certain information. This includes:

- Name.
- Home address.
- Email address.
- Telephone number.
- Subscription preferences

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 or online contact 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 in order to ensure our compliance with data protection legislation.

How do we use your personal information?

We'll send you messages by email, other digital methods, telephone and post to advise you of u3a activities.

We use your personal data for a variety of different purposes during the course of us providing services to you. The purposes for which we use your personal data are set out below. Under data protection law, we can only use your 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 your **consent**;

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- it is necessary to enter into or perform a **contract** we have with you (or to take steps at your request prior to entering into that contract);
- it is necessary to comply with a **legal obligation**; or
- it is in our **legitimate interests** to process your personal data.

Purpose	Legal Bases
To set up and manage your membership	Contract Legitimate interests
To manage membership information on the Beacon system	Contract Legitimate interests
To share with the Trust and TATTL to manage, develop and make improvements to the Beacon system	Legitimate interests
To administer, plan and manage our u3a	Legitimate interests
To monitor, develop and improve the provision of our u3a activity	Legitimate interests
To communicate with you about our u3a products, services, activities and events	Contract Legitimate interests
To communicate with you about Trust products, services, activities and events	Contract Legitimate interests
To deliver Trust publications including Third Age Matters	Contract Legitimate interests
To comply with any legal or regulatory obligations (including in connection with a court order).	Legal obligation
To enforce or apply the agreements concerning you (including agreements between you and us).	Contract Legitimate interests
To manage any issues, complaints, feedback and enquiries.	Consent Contract Legitimate interests

Who do we share your personal information with?

We may disclose information about you, including your personal information:

- Internally – to committee members and group convenors – as required to facilitate your participation in our u3a activities.

- Externally – where we use an external membership management system and with your consent for products or services such as direct mailing for the Trust magazines (Third Age 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.

Where we need to share your information outside of the u3a we will seek your permission and inform you as to whom the information will be shared with and for what purpose.

How long do we keep your personal information?

We need to keep your information so that we can provide our services to you. In most instances information about your membership will be stored for 6 years to meet the requirements of HMRC in regard to Gift Aid. The exceptions to this are instances where there may be legal or insurance circumstances that require information to be held for longer whilst this is investigated or resolved. Where this is the case then the member/s will be informed as to how long the information will be held for and when it is deleted.

How your information can be updated or corrected

To ensure the information we hold is accurate and up to date, members need to inform the u3a as to any changes to their personal information. You can do this by contacting the Membership Secretary at any time: lm3amembership@gmail.com

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

How do we store your personal information?

We have in place a range of security safeguards to protect your personal information against loss or theft, as well as unauthorised access, disclosure, copying, use, or modification.

Security measures include technological measures such as Secure Socket Layer (SSL) encryption, which creates a secure connection with your browser when you register and login into our online services.

Your membership information is held on a database and accessed by committee members and group convenors – as appropriate.

Availability and changes to this policy

This policy is available on our website: www.landm-u3a.org.uk

This policy may change from time to time. If we make any material changes we will make members aware of this via the newsletter and the monthly members' meetings.

Contact

If you have any queries about this policy, need it in an alternative format, or have any complaints about our privacy practices, please contact:

The Secretary: lm3amembership@gmail.com

This policy has been based on the sample policy provided By the Third Age Trust as file Privacy Policy Template – u3a-KMS-POL-004

Description of changes	Date	By
Adopted	March 2018	
Reviewed	27 June 2019	
Reviewed	25 March 2021	
Reviewed	14 October 2021	
Reviewed, amended, reformatted	20 December 2022	M P Hemming