

u3a Harborne and Edgbaston
(Registered Charity Number: 1101356)

PRIVACY POLICY

1. Preamble

u3a Harborne and Edgbaston ('u3a H&E') 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.

2. What Personal Information do we collect?

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

- a. Your Name
- b. Home address
- c. Email address
- d. Telephone number/s
- e. Your subscription preferences, e.g. request for receipt of u3a Third Age Trust magazine
- f. Gift Aid entitlement (if you wish)

3. How do we collect this Personal Information?

3.1 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. The lawful basis for collecting and storing your information is due to the legitimate interest that Harborne & Edgbaston u3a has in communicating with you as a member and the contractual relationship that you, as a member, have with Harborne & Edgbaston u3a. In order to inform you about groups, activities and events that you can access as a member we need to store and process a certain amount of personal data.

3.1.1 **Harborne & Edgbaston u3a website.** To assist with maintaining the security of the website, information will be collected from users of the website Contact Form facility and stored for not more than 90 days. This information will include the message subject, their email

address and name and the emails recipient name and address.

- 3.2 We will request your consent concerning participation in Gift Aid and also if you wish to receive the u3a Third Age Trust magazine.

4. How do we use your Personal Information?

- 4.1 We use your personal information:

- a. To offer Harborne & Edgbaston u3a activities and services to you
- b. For administration, planning and management of our u3a H&E
- c. To communicate with you about your group activities
- d. To monitor, develop and improve the provision of Harborne & Edgbaston u3a activities
- e. For delivery of The Third Age Trust publication – Third Age Matters (with consent)

- 4.2 We will send you information by email, other digital methods, telephone and post to advise you of Harborne & Edgbaston u3a activities.

5. Who do we share your Personal Information with?

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

- a. Internally - to Committee Members and Group Co-ordinators – as required to facilitate your participation in our Harborne & Edgbaston u3a activities
- b. Externally (with specific consent) – for products or services such as direct mailing for The Third Age Trust magazine, Third Age Matters. The magazine is distributed by a third party processor and your information is shared with the distribution company via a secure online portal. Should you not wish to receive the magazine please contact the Membership Secretary.
- c. If we have a statutory duty to disclose it for other legal and regulatory reasons. In this instance we will seek to obtain

your consent. Information would be shared without consent where there were serious safety concerns and it was felt to be in your or Harborne & Edgbaston u3a's best interests to disclose information.

6. How long do we keep your Personal Information?

- 6.1 We need to keep your information so that we can provide our services to you. In most instances information about your membership will not be stored for longer than 12 months. 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 and when it is deleted. In addition, we are obliged by HMRC to maintain records in respect of Gift Aid for 7 years.

7. How your Information can be updated or corrected

- 7.1 To ensure the information we hold is accurate and up to date, members need to inform Harborne & Edgbaston u3a as to any changes to their personal information. You can do this by contacting the Membership Secretary at any time via the Harborne & Edgbaston u3a website or email address: u3a.harborne@gmail.com.
- 7.2 On an annual basis you will have the opportunity to update your information, as required, via the membership renewal process. Should you wish to view the information that Harborne & Edgbaston 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 one month of the request being made.

8. How do we store your Personal Information?

- 8.1 Harborne & Edgbaston u3a has 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 use of cloud storage,

firewalls and use of a reliable online security package. Your membership information is held securely and accessed only by Committee Members and Group Co-ordinators – as authorised and appropriate.

9. Availability and Changes to this Policy

- 9.1 This policy is available on Harborne & Edgbaston u3a website and on request from the Secretary. This policy may change from time to time. Members will be informed via email and the monthly meetings when any material changes are made to Harborne & Edgbaston u3a's policies and procedures.

10. Contact

- 10.1 If you have any queries about this policy, need it in an alternative format, or have any complaints about our privacy practices, please contact us:
email: u3a.harborne@gmail.com or via a committee member at a general meeting.

Adopted: 13 September 2019, based on The Third Age Trust policies in place at the time; superseded by The Third Age Trust Privacy Policy Template, u3a-KMS-POL-004, dated 18/1/2021

Editorial Review: August 2025

Further Review: August 2027

Revision History

Revision No.	Revision Date	Nature of Revision	Approved
1	22/08/2024	Addition of clause 3.1.1. to reflect collection of information from u3a web site.	
2	11/08/2025	Amendment to clause 3.1 to give further explanation on the reason for collecting data.	
		Addition to clause 6.1 regarding holding data for HMRC purposes.	