SKIDDAW u3a

POLICIES and PROCEDURES

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November 2026

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PART 2: PROCEDURES

1. ASSOCIATE MEMBERSHIP

Associate membership: information: Any fully paid up, current member of another u3a can apply to become an Associate Member of Skiddaw. Associate membership fees are charged on a reciprocal basis. The fee payable to Skiddaw u3a being the same as a Skiddaw u3a member would pay to join that u3a. Associate Members do not receive postal communications from Skiddaw u3a but are included in membership-wide emailing.

The conditions applying to Associate Membership are:

i. that s/he has a valid and current membership for another u3a
ii. there is no waiting list for the activity s/he wishes to join
iii. no Associate Member may join any waiting list for any of Skiddaw u3a activities.
iv. s/he pays the costs of the activity on the same basis as other members
v. all group convenors must be full members of Skiddaw u3a

Skiddaw u3a does not have defined geographical boundaries and other local u3as such as Ambleside and Lancaster have similar arrangements.

The Executive Committee will review the impact of Associate Membership at the end of the membership year.

2. INFORMATION FOR CONVENORS:

The following information is given to all convenors. It is updated by the Groups' Coordinator in accordance with changes agreed by the Executive Committee:

Skiddaw u3a

Information for Convenors

"*Interest groups are the life blood of the u3a*" (National Office leaflet)

Thank you for agreeing to become one of Skiddaw u3a's Interest Group convenors. You are playing a vital role and we appreciate the gifts of your time and energy. We hope the following information is useful. Please get back to us with suggestions on how to improve.

Your Executive Committee members are: *Insert list of current EC members from appendix E.*

In case of problems with starting or running a group, your first points of contact is the Groups Co-ordinator: *Insert group co-ordinators details from appendix E.*

2.1 Membership:

2.1.1 Convenors need to check that those attending their group are current members of Skiddaw u3a. Convenors using Beacon can do this online, if an attendee's name is not found on the system then they are not a members or if the members name is coloured red then their membership has lapsed. Non Beacon users will need to submit a list (electronic or paper) to the Membership Secretary for checking.

2.1.2 Convenors using the Beacon system do not need to keep a separate record of group members details as this is available online. Non Beacon users will need to maintain a list either electronically or on paper, this list is subject to GDPR regulations so only record minimal information and protect it in accordance with Skiddaw u3a privacy policy. If more than one member of a group has copies of group members the group members should be made aware of this and the list holder(s) need to be informed of their responsibilities under GDPR.

Duty of care and In Case of Emergency (ICE) details . See 7 GDPR Legitimate Interest Assessment: Next of kin. Submission of this information is entirely voluntary and should not be used as reason to exclude a members from activities. It is a practical idea to make sure that at least ***one other person in the group besides you*** has the names and contact details.

2.2 Finance:

Under Charity Commission regulations, anything done under the auspices of u3a has to be accountable. All activities, especially financial activities, must be visible.

2.2.1 Establishing Costs and Accounting:

(i) You are responsible for the group's finances, although you may prefer to delegate the role of Treasurer to another member of the group.
(ii) The group decides the level of expenditure and charges (not the Executive Committee), and the group will account for itself. Convenors using the Beacon system can record their financial transactions in the Groups Ledger as they go, non Beacon user will need to keep a paper record. Each group must complete a simple financial return once per year **by end of February,** if Beacon is used the records are visible to the treasurer on the system no further action is required. A reminder will be sent to each group to finalise that years record and non Beacon users will need to send their records to the Treasurer.
(iii) No group convenor should ever be out of pocket as a result of running a group. It is important that groups' members are not inadvertently led to expect that venues, refreshments and/or equipment will be provided free of charge. Groups should be set up on a proper financial basis. Be **REALISTIC** about your costs and charge what it costs you to run the Group.
(iv) Unless you convene a Group such as an outdoor activity group where money only changes hands for transport, please keep a **Register of attendees** with an accompanying note of all monies received from each member.
(v) If your Group meets in members' houses, members of the group should be expected to make a contribution towards the cost of refreshments, where these are provided. 50p per person is the usual amount, although you may wish to increase this to cover the costs of printing, photocopying etc**.**
(vi) All costs should be recorded on Beacon or on a Group Accounting form. Refreshments must now be included but costs may be estimated. Please keep all receipts for other items of group expenditure.
(vii) Members using their own equipment for printing should be reimbursed out of monies collected from the group as follows:

- 5p per side for black and white and 10p per side for colour

(viii) If you collect more money than you spend, simply show the surplus on the Accounting Form. (See point **2.4** below about managing surpluses.)

(ix) Members of other u3as who attend our groups should pay the same as other members of the group

(x) Parties, trips and social events are separate from the normal accounting. You don't need to account for this kind of expenditure to the Treasurer.

2.2.2 Hiring village halls and other premises:

(i) New Groups: If you're meeting your Group for the first time, hire the venue for one meeting and divide the cost between the people who have indicated that they are attending this first meeting. If fewer people than expected attend and you have a shortfall in the money received, then apply to the Skiddaw u3a Treasurer to cover this. NB **this only applies to the first meeting of a new group.**

(ii) If the Group decides to go ahead, explain that you will block book the venue for 6/7 weeks, divide the cost between the number of members and inform the group that each member should pay the relevant amount at the next meeting they attend.

(iii) Existing groups: If your Group meets in a venue such as a village hall where you must pay rent, advise each member **IN ADVANCE** about their share of the rent and collect this at the first meeting. It is advisable to block book the venue for periods of 6/7 weeks, rather than for a whole term.

(iv) If new members appear in subsequent weeks, charge **them the same as those who have attended from the start** and explain that any surplus made will be used EITHER to reduce the cost of the next block booking OR to buy equipment/ books etc. The decision about what to do with surplus money should be a democratic decision though the Convenor might choose to give advice. **KEEP EVERYTHING TRANSPARENT AND OPEN**.

(v) Members who are absent from some Group meetings or stop attending should not be given a refund. Explain that the costs are the same whether they attend or not. This is normal practice for all Continuing or Further Education classes and it is a Skiddaw u3a policy agreed by the Executive Committee.

2.2.3. Car Sharing and Transport Costs:

Skiddaw u3a encourages the sharing of cars with a contribution being made by the passengers towards the associated costs. However we cannot make specific recommendations as to how much a passenger(s) should contribute as there are too many factors to take into account and it is a private matter between those concerned. It is suggested that the <u>minimum</u> contribution should be the cost of the fuel and any parking charges etc. divided by the number travelling.

Members should be aware that there are insurance implications in taking money for lifts. The ABI (Association of British Insurers) is supportive of car sharing and have agreed that insurance cover will not be affected if your passengers contribute towards your journey costs (including fuel, vehicle depreciation and associated vehicle running costs), as long as lifts are given in a vehicle seating eight passengers or less and that you do not make a profit from payments received. It is recommend that before becoming part of a car or ride sharing scheme, you check the terms and conditions of your insurance carefully and if in any doubt speak to your insurer to check you have the right level of cover.

2.2.4. Bank Accounts:

(i) Groups may not open bank accounts for their group finances. If a group builds up surpluses or reserves for special activities (such as an outside speaker) and you are not comfortable with

keeping that reserve, then you can give it to the Skiddaw u3a Treasurer who will hold it on behalf of your group.

(ii) DO NOT USE A PERSONAL BANKING ACCOUNT FOR GROUP FUNDS. This is to protect you from any accusations of fraud or from any unpleasantness which might arise in relation to money.

(iii) It is permitted for members to write their own cheques, use their own credit/debit card or make digital payments for agreed group expenses. This is sometimes the most efficient or only way of paying. In such cases, t**he person making the payment must obtain a receipt** and then request reimbursement from the Group Convenor.

2.2.5 Income from sales and donations:

Money collected by a group from sale of produce etc. can ONLY be donated to another charity if that charity shares the same purposes as the u3a. Such donations must always be checked with Executive Committee beforehand.

2.2.6 Equipment and materials:

Equipment / durables are bought by group members for their activities. Generally, it is accepted that items costing £25 or less (maps, books, CDs, consumables) belong to the group but larger and/or more costly items (e.g. camera, table tennis table, recording equipment) become part of Skiddaw u3a assets.

2.3 Insurance:

2.3.1. You are insured against legal liability for accidental injury and death, and accidental loss or damage to property not belonging to you, which arises in connection with the business of the u3a.

2.3.2 If you want details of the insurance cover, there is document called 'Insurance' which can be downloaded from www.u3a.org.uk following the links for Members area home page and reference documents or telephone 020-8466 6139. The Groups Co-ordinator also has a copy.

2.3.3. u3a insurance is still in place whether activities are held in people's homes or in hired premises

2.4. Health and Safety:

2.4.1 All convenors should check the public liability insurance and public performance licences of all the premises they hire.

2.4.2. If you use a public venue, check that they have an **up to date Health and Safety Risk Assessment document** in place. Again, this is for the protection of all of us.

2.4.3 If you use any portable equipment, **especially mains voltage electrical equipment**, check with Equipment Officer concerning inspection and testing. See appendix E for contact details

2.4.4 Walking and cycling leaders should recce the walk / ride first so that they can give everyone who enquires information about the distance, terrain, height, level of fitness required etc. so members can then make an informed decision about joining a walk / ride. On the day itself, brief members on the route, known hazards and emergency arrangements. Be prepared to advise inadequately equipped members not to go. Appoint a back marker. The walk/ride leader should stay at the front and try to ensure that they can see the back marker. Check regularly that the group is coping with the pace.

2.5. Communication:

2.5.1 Group convenors using the Beacon system can use it to record a list of the members in that group. That list can be used to email those members and will automaticity use Bcc (Blind courtesy copy) and thus comply with our GDPR and privacy policies.
Groups not using Beacon will need to record members details by another means and it is the responsibility of the convenor to keep that list safe in accordance with our GDPR and privacy policies. When emailing members via their own email accounts convenors need to ensure that they use Bcc unless those members have agreed to share email account details. When sharing emails etc a record of the permissions to do so will need to be kept.

2.5.2 Items of interest to the wider membership can be sent for the 'Spotlight' newsletter, email the editors at spotlight@skiddawu3a.co.uk

2.5.3 Encourage members to attend **Monthly Meetings**.

2.5.4 Consider utilising the Monthly Meetings to inform other u3a people about **your group's activities** – photos, exhibitions, displays are all most welcome.

2.6 Loan of audio-visual hardware:

2.6.1 The Equipment Officer (see appendix E) operates an equipment loan system so you can borrow a range of kit to enhance presentations or record activities. Kit should be ordered well in advance of when it is need when arrangements for pick-up and return can be finalised. A simple sign-out – sign-in system is in operation.
2.6.2 As some equipment is complex to use, the Equipment Officer has available a series of YouTube instructional videos.
2.6.3 Please note: Some of the equipment has been donated or loaned long term to Skiddaw u3a. If any members have redundant audio visual kit that they would like to donate to us for the common good, it will be gratefully received.
2.6.4 A list of some of the equipment currently available can be found in appendix A.

2.7. Supporting Convenors:

2.7.1. To help convenors discuss convenient meeting times with their group members, the days and times of existing groups can be found on the website at https://u3asites.org.uk/skiddaw/groups

2.7.2 A list of venues used by groups is available on our website. See;
https://skiddaw.u3asite.uk/venue-information/

If you find a new venue or errors in a existing entry then please email the Web Manager at webmanager@skiddawu3a.co.uk to have it corrected or added to the list.

2.7.3 Convenors' meetings are held annually. If you have a topic / issue that could be of benefit to other convenors please feel free to make it known to EC members for discussion at the meeting.

2.7.4. If an issue arises which needs a response from the Committee during the course of the year, please do not hesitate to contact any of us.

3 GROUP SUPPORT FUND:

3.1 Managing the Groups' Support Fund: Deciding how to allocate money available:

3.1.1 All requests should be made to the Committee through Group Coordinator. Requests must comply with the principles outlined below and should include full details and actual or estimated costs.

3.1.2. If the amount being claimed is less than £150.00 a decision will be made by the Treasurer, Chair and Business Secretary, for amounts greater than this the EC will make the decisions. The group convenors will be notified as soon as possible.

3.1.3 A record of purchases made on behalf of groups shall be kept by the Treasurer and shall be available to any member on request.

3.2 Principles:

3.2.1.The GSF can be used for items used in common by all members of the group e.g. geological maps, textbooks, CDs, subscription to a magazine or website etc., provided that these items are passed on to subsequent group convenors. In the case of an item(s) of equipment becoming unused by a group the EC should be notified and they will arrange for it to be transferred to a new keeper or disposed of it if the item is redundant. The Treasurer will amend the asset list accordingly.

3.2.2 Where the GSF is used for subscriptions to magazines, web sites or virtual meeting platforms or the subscription shall be for one year only. If the group wishes to extend the subscription for a further period, then a new application for funding must be made.

3.2.3 The GSF may be used to pay the fees of a specialist speaker and any additional costs incurred such as room hire provided that:

- the speaker is not a u3a member
- it is a single event and not part of a series
- the request arises from the group activity
- and, where appropriate, the wider membership is made aware of the event and is able to attend

3.2.4 The GSF can be used to subsidise visits to galleries, museums etc. provided that:

- such visits are clearly educational e.g. arise from the group activity and aim to further the study of a specific subject
- it is a single event and not part of a series
- where appropriate, the visit is open to the wider membership

3.2.5 Requests for larger and more expensive items for use by a specific group can be made. If purchased, such items remain the property of Skiddaw u3a and must be returned to the organisation if the group ceases to exist.

3.2.6 Courses open to all members such as First Aid will be paid through Skiddaw u3a funds.

3.2.7 Hardware, such as a small projector, for more general and/or occasional use will be purchased by Skiddaw u3a and added to the list of equipment available to all.

3.2.8 The GSF is not to be used for consumables: e.g. those items which are used and kept by individuals such as paper, pens, clay for pottery, thread and fabric for sewing, ingredients for cookery etc.

3.2.9 The GSF must not be used for supporting social events.

4 ASSETS AND EQUIPMENT:

4.1 A list of all equipment owned by the u3a is maintained by the Treasurer.

4.2 A listing all of the equipment available for loan to groups can be downloaded from the website, see; https://skiddaw.u3asite.uk/convenors/

4.3 PAT testing of electrical equipment: TAT advice is contained on their "Legal" webpage this should be adopted https://www.u3a.org.uk/members-area/support/advice-and-guidance#legal

5 GDPR PRINCIPLES AND SCOPE: DATA PROTECTION

Scope of the policy
This policy applies to the work of Skiddaw u3a. The policy sets out the requirements that Skiddaw u3a has to gather information for membership purposes. The policy details how personal information will be gathered, stored and managed in line with data protection principles and the General Data Protection Regulation (GDPR). The policy is reviewed on an ongoing basis by Skiddaw u3a committee members to ensure that we are compliant. This policy should be read in tandem with Skiddaw u3a's Privacy Policy.

Why this policy exists
This data protection policy ensures Skiddaw 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

General guidelines for committee members and group conveners

- The only people able to access data covered by this policy should be those who need to communicate with or provide a service to the Skiddaw u3a members.
- Skiddaw u3a will provide induction training to committee members and group conveners to help them understand their responsibilities when handling data.
- Committee Members and group conveners 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's publications or In Case of Emergency contact details to emergency workers in the event of a serious accident or medical emergency.
- Member information should be refreshed periodically to ensure accuracy, via the membership renewal process or when a policy is changed.
- Additional support will be provided by the Third Age Trust where uncertainties or incidents regarding data protection arise.

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.

Lawful, fair and transparent data processing
Skiddaw u3a requests personal information from potential members and members for membership applications and for sending communications about their involvement with the u3a. The forms used to request personal information will contain a privacy statement informing potential members and members as to why the information is being requested and what the information will be used for. The lawful basis for obtaining member information is due to the contractual relationship that the u3a has with individual members. In addition members will be asked to provide consent for specific processing purposes. u3a 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 as to when the action has been taken.

Processed for specified, explicit and legitimate purposes
Members will be informed as to how their information will be used and the Committee of Skiddaw u3a will seek to ensure that member information is not used inappropriately. Appropriate use of information provided by members will include:

- Communicating with members about Skiddaw u3a events and activities
- Group conveners communicating with group members about specific group activities
- Consent will be sought in order to add members details to the direct mailing information for the Third Age Trust magazines – Third Age Matters and Sources
- 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.
- Providing ICE contact details to emergency workers in the event of a serious accident or medical emergency.
- In the event of an accident resulting in injury or damage to property an incident report form will be completed this will be forwarded to the Third Age Trust by the Secretary. They may share this with their insurers and other parties involved in any claim.

Skiddaw u3a will ensure that group conveners 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.

Skiddaw u3a 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 data portability
- The right to object

Adequate, relevant and limited data processing
Members of Skiddaw u3a will only be asked to provide information that is relevant for membership purposes.

This will include:

- Name
- Postal address
- Email address
- Telephone numbers
- Gift Aid entitlement
- In Case of Emergency contact

Where additional information may be required 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 Skiddaw u3a organises a trip or activity that requires In Case of Emergency information to be provided, a legitimate interest assessment will be completed in order to request this information. Members will be made aware that the assessment has been completed.

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 chair@skiddawu3.co.uk to advise that they no longer wish their photograph to be displayed.

Accuracy of data and keeping data up-to-date
Skiddaw u3a has a responsibility to ensure members' information is kept up to date. Members will be informed to 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 Skiddaw u3a as to any changes in their personal information.

Accountability and governance
The 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. The u3a Committee will ensure that new members joining the Committee receive an induction into the requirements of GDPR and the implications for their role.

Skiddaw u3a will also ensure that group conveners are made aware of their responsibilities in relation to the data they hold and process. Committee Members shall also stay up to date with guidance and practice within the u3a movement and shall seek additional input from the Third Age Trust National Office should any uncertainties arise. The Committee will review data protection and who has access to information on a regular basis as well as reviewing what data is held. When Committee Members and Group Conveners relinquish their roles, they will be asked to either pass on data to those who need it and/or delete data.

Secure Processing
Skiddaw u3a Committee Members have a responsibility to ensure that data is both securely held and processed. All Beacon users are required to sign the Beacon User Access Agreement (Appendix A). 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 or secure cloud systems when sharing data between committee members and/or group conveners

Subject Access Request
u3a members are entitled to request access to the information that is held by Skiddaw u3a. The request needs to be received in the form of a written request to the Membership Secretary of the u3a. Sample form can be found in appendices B. C and D. 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. Skiddaw 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.

Data Breach Notification
Were a data breach to occur action shall be taken to minimise the harm. This will include ensuring that all Skiddaw 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 the u3a shall contact National Office within 24 hours of the breach occurring 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 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. Breach matters will be subject to a full investigation, records will be kept and all those involved notified of the outcome.

6 GDPR PRIVACY PRINCIPLES

Skiddaw u3a 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.

What personal information do we collect?

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

- your name
- home address
- email address
- telephone numbers
- your subscription preferences
- your gift aid information
- In Case of Emergency contact details

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. The lawful basis for collecting and storing your information is due to the contractual relationship that you, as a member, have with the u3a. In order to inform you

about the groups, activities and events that you can access as a member we need to store and process a certain amount of personal data.

How do we use your personal information?

We use your personal information:

- To provide our u3a activities and services to you
- For administration, planning and management of our u3a
- To communicate with you about your group activities
- To monitor, develop and improve the provision of our u3a activity
- To fulfil our duty of care.

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

Who do we share your personal information with

We may disclose information about you, including your personal information

- Internally - to committee members and group conveners – as required to facilitate your participation in our u3a activities;
- Externally – with your consent for products or services such as direct mailing for the Trust magazines – Third Age Matters
- If we have a statutory duty to disclose it for other legal and regulatory reasons.
- Emergency workers in the event of a serious accident or medical emergency.
- To the Third Age Trust and their insurers in the event of a claim for damages.

For members involved in running Skiddaw u3a there may be a need to release additional information. Where we need to share additional information outside of the u3a members should read and complete the process detailed in appendix F

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 a minimum of 7 years if you have agreed to allow UK tax to be reclaimed via Gift Aid (this is to comply with UK tax laws). The exceptions to this are instances where there may be 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 your information can be updated or corrected

To ensure the information we hold is accurate and up to date, member's need to inform the u3a as to any changes to their personal information. You can do this by contacting the membership secretary at membership@skiddawu3a.co.uk 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 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 other 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. Your membership information is held in the Beacon membership system and accessed by Committee Members and Group Conveners – as required by their position.

Availability and changes to this policy

This policy is available via the 'Documents' tab on our website https://skiddaw.u3asite.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 us at chair@skiddawu3a.co.uk.

7 GDPR LEGITIMATE INTEREST ASSESSMENT: In Case of Emergency (ICE)

This legitimate interest assessment has been compiled in order to set out the reasons why Skiddaw u3a requests ICE details.

Purpose Test

The reason that Skiddaw u3a requests contact details for members' ICE is so that the committee and/or group conveners know who to contact in the event of an emergency. Skiddaw u3a has a duty of care to its membership and in order to ensure your safety we need to be able to contact someone who can meet your welfare needs in the event of an incident/accident. Skiddaw u3a requests members to inform the person identified as your ICE contact that you have provided their details to the u3a. For certain events and trips we may need to provide these details to a 3rd party. Skiddaw u3a will always make you aware where ICE information is requested as to who information will be shared with.

Necessity Test

The ICE information provided by members will only be used in the event of a serious incident/accident. Skiddaw u3a would use the information to contact someone who may need to collect the relevant member, support the relevant member or liaise, on behalf of the relevant member, with a third party provider such as a medical professional. Skiddaw u3a only requests minimal information regarding members' ICE contact which includes a name, telephone number and the details of their relationship to the member.

Balancing Test

The ICE data requested is minimal and is only that which is required to make contact with the individual in question. Skiddaw u3a relies on its members to provide ICE information and to make the individual aware that this information has been passed to the u3a and for what purposes it has been passed to the u3a. Skiddaw u3a will hold this information securely and it will only be accessed by those who need to see it. The information provided will only be used to contact the ICE contact where an incident or accident occurs that requires someone to take responsibility for the member in question. The data will not be processed for any other purposes.

Through compilation of this assessment Skiddaw u3a considers that it has a legitimate interest to collect, hold and process ICE information. This information is stored in the u3a Beacon system and / or on records held by the Group convenors.

8 GDPR Special category data

A definition of special category data can be found on the Information Commissioner's Office website.

https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/lawful-basis/a-guide-to-lawful-basis/lawful-basis-for-processing/special-category-data/

Skiddaw u3a does not collect any special category data and has no lawful basis to process such information.

The most likely type of special category data that may be encountered is medical conditions. If a member wants to make a convenor aware of a condition that could affect their health the best way is for the member to record the details on a medical record card and make the convenor aware of where the card can be found.

This assessment will be reviewed every 2 years in order to ensure that legitimate interest remains the most appropriate lawful basis for gathering this information.

Siddaw u3a Excecutive Committee
27th September 2026

APPENDICES

A. Skiddaw u3a Beacon User Access Agreement

This document is required to allow Skiddaw u3a to meet the term and conditions of the Beacon User u3as agreement. This document can be viewed at https://beacon.u3a.org.uk/terms/

Name……..

I confirm that I have read and understand Skiddaw u3a Data Protection and Privacy Policy and will comply with its requirements.

I confirm that when using the Beacon System, I will always process any personal data only for the purpose for which it was collected and in compliance with all applicable laws including, but not limited to, the Data Protection Law.

I confirm that when using the Beacon System, I will not access it from a shared device except where I have a secure personal logon for the shared device.

I confirm that any device I use to access Beacon has a currently supported operating system and that I take adequate security measures to keep my device free of viruses and other malware which might enable unauthorised access to Beacon System.

I will ensures that my password is kept securely and not shared with others.

I will not access the Beacon System via a public computer, e.g. in a public library.

I will promptly notify the u3a System Administrator (webmanager@skiddawu3a.co.uk) if my password or device (PC tablet etc.) is compromised, lost or stolen. If I am still able to access Beacon from an uncompromised device I will change my password.

I will promptly notify the u3a System Administrator / Chair should a data breach occur or be reported to me (webmanager@skiddawu3a.co.uk or chair@skiddawu3a.co.uk).

I will promptly notify the u3a System Administrator if I no longer need access to Beacon or my level of access is no longer appropriate to my position / job.

You may choose your own username. Its can only have lower case letters or numbers with no blank spaces and should be personal to the user (e.g. jbloggs), rather than relating to a role such as Membership Secretary and should be between 8 and 12 characters.

Preferred User ID ……

On sign off of this form the System Administrator will initialise your user id with a temporary password that will have to be changed at the first logon. Note the SA cannot see or change your password, only reset it to a random one which you will need to change.

Signed ……..

B. Subject Access Request

Request example

To the Membership Secretary Skiddaw u3a

I wish to make a formal request for access to all the information about me which you hold on your data systems.

Full name

Address (including postcode)

Membership number

Date request made

C. Acknowledgement of request example

Dear ***insert name***

Thank you for recent your ***letter/email*** received on ***date*** requesting access to your personal information held by Skiddaw u3a.

We aim to process the request as soon as possible and certainly within 30-days from the date the request was received. You will therefore hear from us no later than ***insert date 30-days after request receipt.***

If for any reason we are unable to provide the requested information within this time frame, we will inform you immediately, providing a full explanation for the delay.

In the interim if you have any queries, please do not hesitate to contact me.

Yours sincerely, ***insert your name plus contact info and date***

D. Response to request example

Dear ***insert name***

Further to your recent access request, please find enclosed/attached a copy of all personal information relating to you that is currently being stored or processed by Skiddaw u3a.

Insert collected data

As per data protection law, you have the right to request the rectification of any inaccurate or incomplete data held by us.

Yours sincerely, ***insert your name plus contact info and date***

E. u3a Officers

Executive Committee:

Hon President	Sylvia Pilling	
Chair	Keith Lunson	chair@skiddawu3a.co.uk
Business Secretary	Ann Alves	secretary@skiddawu3a.co.uk
Treasurer	Mike Cave	treasurer@skiddawu3a.co.uk
Membership Secretary	Jim Pawson	membership@skiddawu3a.co.uk
Groups Co-ordinator	Barbara Newton	groupscoordinator@skiddawu3a.co.uk
Speaker Secretary	Roger Gook	speakers@skiddawu3a.co.uk
Social Secretary	Paul Titley	social-secretary@skiddawu3a.co.uk
Website & Beacon Admin	Mark Bradley	webmanager@skiddawu3a.co.uk
Equality and Inclusion	Anna Nolan	inclusion@skiddawu3a.co.uk

Non EC Support members

Publicity Contact	Kelvin Rushworth	publicity@skiddawu3a.co.uk
Equipment Officer	Martin Love	equipment@skiddawu3a.co.uk
News Letter Editors	Maggie Potts Chris Lewis Gill Frances	spotlight@skiddawu3a.co.uk

Appendix F. GDPR Release of personal information

As a charity, Skiddaw u3a is obliged to abide by UK GDPR (General Data Protection Regulations). For the majority of members how we meet these obligations is detailed in our privacy policy. For members who are involved in the running of the u3a, there are additional requirements to make personal data available to third parties or to the public. Set out below are details of these requirements.

The Charity Commission (CC) for England and Wales

As a charity, Skiddaw u3a is required to be registered with the CC. When a committee member is elected, normally at the AGM, or co-opted to the Executive Committee (EC), they become trustees of the charity. There is a legal requirement to register trustees with the CC. This is normally carried out by the Secretary. The information required by the CC is:

Full name (your legal name)	Date of birth
Address	Any other trusteeships held
Telephone number	
Email address	Registered address *

Third Age Trust (TAT)

The Third Age Trust represents and supports the majority of u3as in the UK. Skiddaw u3a is affiliated to TAT. As part of the affiliation agreement, TAT has to be supplied with details of the key officers of Skiddaw u3a. These are the Chair, Secretary and Treasurer. A u3a may also register details of officers who provide other services to their u3a. For Skiddaw u3a, this includes the Membership Secretary, Beacon Administrator and the Web Manager. These details are normally supplied to TAT by the Secretary by using the u3a Portal. The information required by TAT is:

First name and surname (this can be a known as name)	Telephone number
Email	Correspondence address *

For the Membership Secretary, there is an option to supply their address and telephone number to allow prospective members to contact them. The current Membership Secretary has declined to supply their address and telephone number (21/11/2025).
*A single correspondence / registered address is required; this is usually the Chair's or Secretary's home address, as we have no permanent office.

North West Region of u3as (NWR)

The NWR provide information and support for u3as in the North West area of England. Skiddaw u3a is registered with the NWR. The NWR record the details of the key officers of Skiddaw u3a, who are the Chair, Secretary and Treasurer. The Secretary supplies this information to the NWR by email. The information required by NWR is:

First name and surname (this can be a known as name)	Email

Optionally, a telephone number can be supplied.

For the above organisations, there is an obligation to supply the required information, which, once supplied, becomes subject to that organisation's Privacy Policy. All these organisations have websites with links to their Privacy Policies.

To allow the running of Skiddaw u3a's activities, there is a need to provide the means of communication with members. At its simplest, this is via the Contact Form on the Website, which requires only a contact name. The email of the recipient is not available to the sender. Note: when replying to an enquiry received via the Website, the email address used by you will be visible in your reply.

Many activity organisers want to take a more personal approach and include addition information. However, to release any of your personal information requires your specific permission. The form below is intended for trustees, officers, group convenors and any member acting in a supporting role with Skiddaw u3a to record their permission for the release of their personal information.

This form is for use by those members who have to, or need to, release personal information as part of their activities with Skiddaw u3a. You need to agree to provide only this information which allows you to do your job effectively. You do not need to enter the actual personal information onto the form. Instead, the current details held on the Beacon system will be used. If you want information different from that held on Beacon to be used, then enter it in the Additional Information box. You need to enter only 'Y' for Yes or 'N' for No in the appropriate box in the table below, which specifies which information is to be released and for what purpose. An entry of anything other than Y or Yes will be assumed to mean No. I hereby agree that, in addition to the above data requirements specified by the Charity Commission , Third Age Trust and North West Region of u3as, Skiddaw u3a can release the following information for the uses indicated below.

Name	Signed	Date

	Skiddaw u3a Website	Spotlight Newsletter	Annual Guide to Groups (print only)	Local Newspapers	u3a Publicity release
Name					
Address					
Telephone No.					
Mobile No.					
Personal Email					
Individual Photo					

Additional Information e.g. an alternative email address

Notes. All the above communication outlets, except the Annual Guide, which is available only as a printed copy, will be available on the internet. Newspapers are no longer restricted to the printed version, as most are available online, including *The Keswick Reminder*.

These permissions will remain in place until you advise us otherwise or cease to be a trustee / officer / convenor / member. You can cancel this agreement at any time by contacting the Secretary in writing or by email. Skiddaw u3a will remove your details from our systems and ask those organisations we have a formal agreement with to remove those details from their systems as quickly as is practicable. You need to be aware that we cannot force any third party to delete your information which they have copied or downloaded from the sources through which you have agreed to make your details publicly available. Neither can you remove or recover such information.