

MERSEYSIDE CIVIC SOCIETY – PRIVACY POLICY

This document sets out Merseyside's Civic Society's Privacy Policy as it relates to the storage and use of personal data. The policy will be reviewed formally by the Society's Council on an annual basis, but may be amended at any time.

1) Personal Data retained by Merseyside Civic Society

Merseyside Civic Society retains personal data as follows (insofar as it has been provided). This list is intended to be exhaustive but may be added to or amended at any point in time:

- Domestic postal address
- Personal Phone number (landline and mobile)
- Email address
- Signature
- Details of any membership subscriptions paid
- Details of any donation made
- Details of any Gift Aid authorities given
- Details of any events attended and payments made
- Photographs¹

Merseyside Civic Society stores personal data either electronically or physically. Where the data is stored electronically, this is stored on a device that can only be accessed by the Secretary of the Society and any other Society members authorised by the Society's Council. As a minimum, the data is password protected (via a login). Membership information is retained on an Excel spreadsheet. Data is also stored electronically on Mailchimp and Eventbrite, both of which are password protected. Where data is stored physically (this includes gift aid authorities, paper membership forms, physical attendance lists from events, correspondence), this information is retained in a secure environment only accessible by an authorised Society member.

Personal information as defined above relates to information in the following two categories:

- individual members and patrons
- corporate members and community group members (specifically relating to personal data held about the Society's main contact or contacts at that organisation or their representatives)

¹ Photographs: Merseyside Civic Society may take photographs at events and these photographs may be used in future publicity materials. Given that Society volunteers may not be able to recognise everyone at an event, we would ask attendees to inform us if they do not wish their photos to be used in this way at the time the photographs are being taken.

2) Retention of personal data

Merseyside Civic Society will not solicit personal data from third parties. All data retained is limited to that which has either been volunteered to us by the party concerned or in the case of corporate/community group memberships, is provided by someone as a contact point for the organisation. We will retain data on the following basis:

a. Individual Members and Patrons

Merseyside Civic Society will retain personal information obtained from its individual members and patrons for as long as the Society deems it necessary (in conformity with the relevant legislation). In practical terms this will mean:

- Throughout the period that their membership is live
- For a fixed period of time after they have resigned their membership as follows:
 - o Until the end of the financial year following their membership resignation
 - o For those members whose donation is gift aided, the Society is required by HMRC to retain this information for a period of six financial years after the end of the financial year in which the transaction occurred

b. Corporate members and Community Groups

Retention of corporate or organisational information relating to corporate members and community groups falls outside of the scope of this policy, whereas retention of personal information relating to individual members or employees of these organisations is within the scope of this policy.

Where personal data is retained relating to members of these organisations, The Society will retain this information until the end of the financial year following that date upon which their organisation ceases to be a member of the Society, following which it will be deleted, unless over-riding legislation requires retention for a longer period.

3) Management and disposal of personal data

a. Responsibility for personal data management

The Secretary of Merseyside Civic Society (a Trustee) is the nominated data manager whose responsibility it is to oversee the management of data within the organisation and reports directly to the Vice Chairman of the Society (a Trustee) who has corporate responsibility for data management. The data manager will ensure that data within the organisation is managed in accordance with this policy.

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b. On-going audit of information held

Notwithstanding the specific requirements of this policy, Merseyside Civic Society will undertake a rolling audit of data held to demonstrate how we seek to comply with relevant data protection and privacy legislation.

c. Accountability

Merseyside Civic Society's Council (Trustees) will receive an annual report jointly authored by the data manager and the Trustee with responsibility for data management which will outline how this policy is being implemented.

4) Opting out of Merseyside Civic Society's communications (existing members and patrons as at 25th May 2018 – implementation date of General Data Protection Order)

From 25th May 2018, Members of the Society may opt out of receiving Merseyside Civic Society's communications except for those communications necessary for the Society to fulfil its responsibilities to members (including, but not limited to, notice of AGMs and EGMs and the papers relevant to those meetings). If members wish not to receive any such communications, they must resign their membership.

Members may review and revise the methods of contact we use on an on-going basis

The Society communicates with its individual members and patrons in the following ways:

- By post (including occasional newsletters, events information and notice of AGM)
- Via email (including electronic newsletter, reminders about membership, notification of events and AGM)
- By phone including text message (generally used to inform members at short notice – for example event cancellations)

The Society may also periodically contact members (via post or email) about events organised by others thought to be of interest (although we will never provide third parties with information about our members) Members will be informed about how they can opt out of receiving information on an on-going basis (for example via our newsletter, online via our website).

Members wishing to change their communications preferences or resign their membership can do so by writing to the Secretary of the Society at MCS Secretary, 21 Alma Road, Liverpool L17 6AH, or, by emailing secretary@merseysidecivicsociety.org

5) Opting into Merseyside Civic Society communications (new individual members and patrons joining after 25th May 2018)

From 25th May 2018 any new member or patron will be able to choose how we communicate with them by opting in to a menu of communication options:

- By post
- Via email (including electronic newsletter, reminders about membership, notification of events)

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- By phone including text message (generally used to inform members at short notice – for example event cancellations)

The Society may also periodically contact members (via post or email) about events organised by others thought to be of interest (although we will never provide third parties with information about our members)

6) Information provided to Community Group and Corporate Members

Merseyside Civic Society will contact these organisations by post, email and phone. As organisations, there is no formal requirement for Merseyside Civic Society to obtain an opt in/opt out, but such organisations will always have the right to vary the way in which we communicate by mutual consent.

7) The rights of individuals whose personal information is retained by the Merseyside Civic Society

Anyone has a right to ask the Society to inform them what personal information is held about them at any time. This information can be obtained either by contacting us by post or via email (secretary@merseysidecivicsociety.org). This information will be provided within one month of the request being made. Anyone has the right to correct the personal information the Society holds about them (or to request amendment). The information will be amended within one month of the request being made. Individuals have the right to ask for all personal data to be deleted at any time. This will be done within one month of a request being received, unless the Society believes that there is an over-riding legal requirement for the data to be retained. In those circumstances, the data will be retained and the individual will be informed why their request has been declined. Individuals may vary the nature and means of communication they receive at any time by notifying the Society in writing by post at MCS Secretary, 21 Alma Road, Liverpool L17 6AH or email (secretary@merseysidecivicsociety.org).

8) Historically significant information The Society has the right to retain information it deems to have potential or actually historical significance. Where personal information is included as part of this information, the Society will retain the minimum personal information necessary to maintain the integrity of the information concerned, but will not use this personal information for communication purposes

9) Privacy terms

Merseyside Civic Society will include a paragraph indicating that we communicate in terms of an established privacy policy in e-newsletters and our website booking pages.

10) Storage of data by third party organisations

Merseyside Civic Society uses a variety of third-party systems to manage its activity (these include Mailchimp, Eventbrite, Survey Monkey, Doodle Polls). Any data extracted from these systems will then be managed according to this privacy policy. Individuals providing personal information using these platforms will also be subject to the terms and conditions of those platforms.

11) Validity of this privacy policy

Merseyside Civic Society will begin to implement this policy from 25th May 2018. Current version as amended and agreed by Merseyside Civic Society Council on 10 March 2021