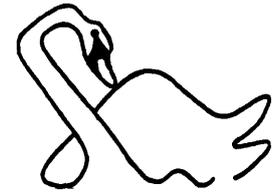


The Swan Theatre Company



Personal Information – Privacy Policy for its use and management

Background

The Swan Theatre Company (The Swan) needs to hold some personal information on its members and patrons in order to allow it to run the Theatre effectively and efficiently. The Swan is registered with the Charity Commission and with Her Majesty's Revenue and Customs (HMRC) as a charity, registration number 292763. The Swan is not registered with the Information Commissioners' Office (ICO) under the requirements of the Data Protection Act (DPA) because it is a not-for-profit organisation and only holds information consistent with the efficient running of The Swan, what is known legally as "legitimate interests". Under the General Data Protection Regulation (GDPR) which is in force from 25th May 2018, there is no registration requirement but the ICO receives a notification fee. The current exemptions from DPA registrations applicable to The Swan are expected to apply to the payment of that fee.

Members and patrons will have legitimate concerns about how their personal information is used and looked after by The Swan. The Swan does endeavour to manage the personal information in accordance with the best practice guidance provided by the ICO which can be freely obtained from their website – www.ico.org.uk. You can raise a complaint with them should you feel The Swan is not looking after your information appropriately. This document is intended to assure the members and patrons that The Swan is managing their information appropriately in the current environment of potential identity theft, fraud and related concerns and it has been updated to reflect the new requirements of the GDPR.

Membership information

Information held and its use

Members and patrons provide The Swan with certain pieces of personal information including addresses, telephone number and email addresses in order to allow the Membership Secretary to undertake his/her normal duties. A date of birth is requested (but is not obligatory) for further identification purposes – people join with similar names. The information collected is used in a number of ways defined as the "Lawful basis for processing the information" as required under the GDPR and regarded as the "legitimate interests" of the data subject since without it The Swan could not operate effectively. These uses are as follows:

- To provide contact details of all patrons and members.
- To use for direct marketing to members covering productions and related activities carried out by The Swan. This could be by email, telephone (text message) or post.
- To ensure those involved with managing the productions at The Swan have details of those who wish to be involved onstage, back-stage or front of house.
- To manage the collection of the appropriate membership fees for members or patrons.
- As proof of membership for insurance purposes.
- To provide statistical (anonymous) information to the Swan committee and to the Little Theatre Guild of Great Britain on, for example, the number of members and patrons.
- To send out theatre-related information on behalf of third parties which it is believed might be of interest to members or patrons.

The information held is never passed or sold to any third party for any reason with the exception of those occasions when The Swan might be required to pass information to authorities for legislative or law enforcement reasons, or to facilitate the running of The Swan as explained elsewhere in this document. Anonymous statistical information is currently shared with the Little Theatre Guild of Great Britain only, although other third parties might be provided with the anonymous information for similar purposes.

Each membership year, starting on 1st April, the Membership Secretary will ask all members and patrons to confirm their personal information, to highlight any changes made and to review their consent for their information to be used appropriately by The Swan. At this time, or at any other time during the membership year, a member or patron can ask to be provided with a copy of the information held by The Swan and/or for their details to be changed with respect particularly to their consent to receive direct marketing. This can be achieved by contacting the Membership Secretary by email or by letter addressed to The Swan Theatre at the address below. Should a member or patron not wish to have their personal information retained and used by The Swan Theatre in accordance with this policy, their membership will lapse immediately on that request being made.

Information Management

The Data Controller for The Swan is the Chair Person and it is their role to ensure that the processing of all personal data is undertaken in accordance with the law and this policy.

The management of the personal information held by The Swan is undertaken principally using a database specially developed using Microsoft Access software. Access to this database is limited by password to those directly involved with the management of the information – the Membership Secretary and his/her assistant. The database is routinely backed-up to a secure location to ensure full resilience is provided. A paper copy of the initial application form is retained under secure conditions by the Membership Secretary during the period of membership for business continuity purposes.

The Membership Secretary will provide the information as described above to named individuals for specific purposes and will limit the information provided to that essential for the effective and efficient running of The Swan. This will be done in an appropriately secure manner and only as an extract of the main database rather than the database in its entirety. An example of this might be that a Director or Producer of a forthcoming show would be provided with the names and contact details of those members who might be interested in assisting with the show either on stage, backstage or in some other way. Those responsible for the running of the bar and front of house services are similarly provided with the names and contact details of all members and patrons who have expressed a willingness to help in those areas. The individuals are always reminded of the sensitive nature of the information and asked to return it or appropriately destroy it once it has served its useful purpose. A list of email addresses is held by the Membership Secretary for sending out the routine newsletters (see Mailchimp below) and the Membership Secretary also provides addressed envelopes for those receiving the newsletter by post. All these lists are updated as and when appropriate, based on members and patrons leaving or joining.

Should it be thought appropriate to distribute the personal information in some further ways than those noted here, it would only be done with the express permission of those members or patrons involved. This might be for the purposes of a production or other activity beyond the usual remit of The Swan.

Mailchimp and Doodle

The Swan uses a commercial service to distribute emails to all members and patrons. This is provided by Mailchimp who therefore collect and use email addresses for that purpose. Mailchimp is a company based in the USA and so the information will be stored in the USA under the security agreement between the USA and the EU called Privacy Shield which ensures the standards used are comparable with those in the EU. The privacy policy for Mailchimp can be found here:

<https://mailchimp.com/legal/privacy/>

The Swan also uses Doodle to manage the volunteering support for productions. The privacy policy for Doodle can be found here: <https://www.doodle.com/privacy-policy>

Retention period

When a patron or member decides not to renew their membership of The Swan, their information is retained for a period not exceeding twelve months after the renewal date. This allows any errors or forgetfulness to be managed appropriately without retaining personal information unnecessarily. It does mean that if someone decides to re-join with a gap of more than twelve months after their membership lapsed, they will be asked to provide all the information again. All information held electronically will be securely deleted and all paper copies will be securely shredded.

None of the information currently held electronically by The Swan is encrypted but is always password protected. It is considered appropriate security for what is, in general, low value information. The quantity of information is fairly limited, there being approximately 300 paid-up members and patrons at any one time, which also justifies the more limited security measures put in place.

Financial information

Information held and its use

Member and patrons may choose to provide their bank account details in the form of a Standing Order mandate in order to allow The Swan to collect their annual fees in a timely and efficient manner. In the Standing Order system, it is the bank of the patron or member who initiates the payment at the appropriate time. It is felt by The Swan that leaving the control with the patron or member is a better mechanism, although slightly more expensive and slightly less efficient. It gives the patron or member full control to cancel the payment at any time without reference to The Swan.

Taxation Gift Aid forms are also held by The Swan in order to meet the requirements of HMRC. This information is not used for any other purpose than claiming the tax rebate in accordance with current regulations and legislation.

The financial information held by The Swan is used for very limited purposes:

- To ensure the records of payments are appropriately added to the membership database.
- To monitor the payments made to The Swan.
- To help patrons and members sort out issues when they arise regarding the payment of fees.
- To allow the Treasurer to sort out any issues with the relevant bank if there is a problem.

Information Management

The bank account details (as provided on the mandate form) are securely retained in paper form under lock and key by the Swan Treasurer only. They are not passed to anyone other than the appropriate bank for any reason.

Retention period

The paper copies of the Standing Order mandates, Gift Aid forms and related financial information are retained for a period of up to seven years after the patron or member has cancelled their membership in order to ensure no inappropriate financial transactions occur after the membership has lapsed, and to comply with HMRC regulations. They are held securely under lock and key and then securely shredded at the appropriate time.

Purchase of tickets for productions

The Swan Theatre internet website (www.Swan-Theatre.co.uk) is used to provide booking services to members and patrons only during the advanced booking period, and to the general public for the final three weeks prior to the first performance. The payment for these tickets is made utilising Braintree, a global “all-in-one-payments partner” which works in association with PayPal, a trusted and established financial technology brand, and The Little Box Office who provide the online ticketing system in use with the Swan.

The Little Box Office privacy notice can be seen here:

<https://thelittleboxoffice.com/cms/page/privacy>

The PayPal privacy policy which covers many of the activities of Braintree can be found here:

<https://www.paypal.com/webapps/mpp/ua/privacy-full>.

The Braintree privacy policy is available here:

<https://www.braintreepayments.com/en-gb/legal/braintree-privacy-policy>

The Swan Theatre Company has access to some of the financial information supplied during these transactions by being provided with a record of the name, email address and bank card details used by the customer together with the value of the transaction. This allows the Swan to address queries about transactions and to reconcile the payments made with the bank.

The Swan has a listing of those who have purchased tickets for any particular show which is used in the theatre on the night and for statistical purposes. These details are also used for email marketing of the next Swan shows for those who have requested to be sent such information. It is not shared with any other organisation nor used for any other purpose.

Financial Information held for Expenses claims

Members of The Swan who incur legitimate expenditure on behalf of The Swan buying items such as stationery, stamps, costumes, properties, paint, tools, staging, make-up, etc. are reimbursed by the Treasurer. In order to do that the Treasurer holds the banking details of the member to allow credit transfers to be made. These details are securely retained by the Treasurer under lock and key or password-protected electronically as appropriate. Once again in compliance with the HMRC regulations, details of these transactions are retained for a minimum of seven years and are only shared with The Swan’s official auditors and HMRC as required. Once the appropriate period has elapsed they are then securely shredded or otherwise destroyed.

Further information

Should you have any concerns or issues with this policy document, please contact the Membership Secretary, the Treasurer or the Chair Person via the Swan Theatre, 138 Park Street, Yeovil, BA20 1QT or by email at: swantheatre@gmail.com