



## **AEP PRIVACY POLICY**

### **Document control summary**

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## **AEP PRIVACY POLICY**

This Privacy Policy sets out details about how the AEP will use any personal information that it collects about you. We encourage you to read this policy as it explains the AEP's practices involving the use of personal information and sets out information about rights that you may have under applicable laws.

The AEP is a membership organisation providing services to its members as a professional association and trade union. We are committed to protecting your privacy in accordance with the law.

We are committed to protecting your privacy and keeping your data safe. If you have any questions about this policy, or about the AEP's use of your personal information, please email [dpo@aep.org.uk](mailto:dpo@aep.org.uk).

### **Data controller**

The AEP is the data controller of any personal information that we collect about you. We are registered as a data controller with the Information Commissioner's Office under reference Z5146621.

### **Collection and use of personal data**

If you are member of the AEP, or if you apply to become a member, we will collect from you and hold information including your name, gender, date of birth, nationality, the date you qualified, your programme of study (student members), your HCPC number (registered members), your home address, telephone number, email address, details about terms and conditions, bank account details, employer and manager details, place of work or study, job title, job description, contract, working hours, job grade, contract type, length of time in post and professional qualifications.

We will use the personal information that we collect about you so that we can carry out our functions, purposes or objects as a trade union and professional association, including those set out in the Members' Handbook, provide membership and related services and comply with certain statutory obligations. This will include but may not be limited to:

- assessing your eligibility to become a member of the AEP
- verify your identity and qualifications
- administer your membership, including by collecting membership payments from you
- provide the benefits of membership and trade union services to you
- promote the AEP and fulfil its aims, for example by lobbying on initiatives and campaigns and provide parliamentary updates
- assessing and developing services which may be of interest to members
- running internal elections or ballots,
- provide you with services and advice that you request, for example providing advice, support and representation on employment and professional issues
- provision of CPD courses
- registration for and attendance on AEP courses
- the supply of the AEP's Journal and newsletters

- to administer branch and other meetings
- providing branded material for events and campaigns you may be organising and supporting
- comply with our legal obligations, protect and defend our rights and to pursue our legitimate business interests
- prevent and detect financial and /or identity fraud
- keep you up to date with news about the AEP's activities, courses, events and recruitment advertising and information according to your communication preferences.
- clearing house duties for English universities
- other services/benefits and to tell you about events, courses, offers, recruitment and general advertisements.

We may also ask you to provide us with sensitive or 'special category' personal information such as your ethnic origin, details of any disabilities you have, your religion or belief and your sexual orientation. You do not have to provide us with this information, however if you do choose to do so, we will use it to ensure that services are delivered in an equitable and non-discriminatory way. We will also anonymise sensitive or 'special category' personal information in order to gather statistics and assess the demographics of our membership.

In the process of providing member services and pursuing our legitimate interests, we may also process your data in the following ways:

- record details of your interactions with us including details of telephone conversations with our enquiries team
- record details of information you have given us and advice we have provided to you in your membership record
- record complaints about the AEP. When we receive complaints about us, we create a complaint file. Usually the file will contain the identity of the person complaining and other people involved in the complaint. We use personal information to deal with the complaint. We may also use the information to check and improve our level of service. Where we do this, we do it to help inform us how to improve the way we work since both we and those we deal with have an interest in us doing so.
- analyse anonymised details of your visits to our website.

To ensure the AEP provides accurate support and services the AEP will hold personal data about its members and registered users of its website.

If you register for an account on the AEP website, we will collect information about you including your surname, AEP number and email address. We will use this information to:

- verify that you are eligible to create an account
- allow you to log in to your account, once it has been created
- administer access to your account and ensure its security
- keep our systems secure
- contact you about your account where required.

The AEP website takes every precaution to protect our members' information: when personal and sensitive information is submitted via the website it is protected. Such information between the website and our membership & management information system, is encrypted and is protected.

The AEP website contains links to other websites and the AEP is not responsible for the content or the privacy policies of such other sites. Operators of other websites may collect information from you which may be used in a manner which is inconsistent with this privacy policy. (See AEP Cookie Policy for further information).

## **Emails**

We may send members several different types of email:

- Administration, governance and legal matters, for example subscription renewals notices, annual general meeting notifications and trade union ballots.
- Delivery of the membership package, for example the Journal and newsletters, provision of the online journal service EBSCO, provision of parliamentary reports. This is part of our subscription agreement with members.
- Promotion of member benefits, information relating to the renewal of HCPC registration, information services and opportunities to get involved, promotion of and information about CPD courses or other events we are running, CPD events or courses run by other providers and job advertisements.

We use our legitimate interest, contractual legal basis or consent as the legal basis for sending these.

If you wish to opt out of receiving emails about third party services including recruitment adverts, external courses and events and general advertisements or marketing, please email the Data Protection Officer at [dpo@aep.org.uk](mailto:dpo@aep.org.uk).

Where members have indicated that they do not wish to receive communications by email, SMS and phone, the AEP will revert to physical post as a means of discharging any of our statutory duties.

## **Your Vote (AEP Members Only)**

You are responsible for managing your personal information and keeping it up to date on the website. Periodically we will ask AEP members to check their details for any changes and to confirm that their details are up to date. This enables us to maintain accurate records and so provide effective, relevant services and support and to comply with our legal and data protection obligations as a professional association and trade union. The AEP treats your home address as your ballot address for all legal purposes. You can, however, nominate another address such as your workplace. The law requires that this be done in writing. So, if you want to nominate your workplace, or another address, please do so, in writing, to the AEP Membership Records department, [enquiries@aep.org.uk](mailto:enquiries@aep.org.uk).

## **If you are not an AEP member**

If you are not an AEP member but interact with our organisation, we may collect and hold information about you if you:

- contact us by any means with an enquiry
- visit our website
- book an event with us
- place advertisements with us
- engage with us on our social media platforms
- If you apply for a job with us, we collect your name, address, email address, phone numbers, employment history, qualifications/education.

## **How we may share your personal information**

We may disclose some of your personal data in so far as is reasonable and necessary for the purposes set out in this privacy policy as follows:

- our employees, officers and officials, the NEC, AEP workplace representatives, case workers and agents, contractors and other service providers who are associated with or instructed by the AEP and volunteers
- your employer, where you consent to us doing so or where this is necessary for us to provide a service or advice that you have requested from us;
- our service providers, such as IT hosting companies
- third parties such as the publishing house involved in the publishing of our Journal
- travel companies, hotels and venues used for AEP conferences, meetings and events
- banks and financial institutions that process payments on our behalf
- professional advisors such as lawyers, insurers, accountants, auditors, and financial advisors
- regulatory authorities including tax authorities
- law enforcement agencies, courts and other tribunals
- All our website financial transactions are handled through our payment services provider, Sage Pay. You can review the provider's privacy policy at <http://www.sagepay.co.uk/policies/privacy-policy>. We will share information with our payment services provider only to the extent necessary for the purposes of processing payments you make via our website, refunding such payments and dealing with complaints and queries relating to such payments and refunds.
- if you join any of the AEP's networks, working forums or electronic groups (including email and social media), your contact information will be used and shared within that group so that relevant information can be shared with you.

## **DBS Applicants**

If you make an application for DBS check through the AEP website, we will collect information about you including your surname, AEP number and email address and identity documentation We will use this information to:

- to carry out our obligations arising from your DBS application
- to confirm identity checks
- to confirm payment has been received

Any applicable personal data will be uploaded and sent to ARC who act as an umbrella body for the Disclosure and Barring Service, and are an independent controller of data.

This means that any information gathered, whether it is on paper or in an electronic format, will only be used in the context of processing DBS applications and retained in line with the guidance detailed below.

We do not hold any personal data longer than necessary, having considered the purposes for processing and in any event no longer than 6 months after results are issued. After this time the AEP will delete data securely.

The AEP will not disclose any of your personally identifiable information to any third party unless they are processing data on the union's behalf, we have your permission, or under special circumstances, such as when we believe in good faith that the law requires it. Where the AEP uses the services of these organisations, they are contractually obliged to process your data on behalf of the union as data processor and in a secure and confidential manner.

## **The legal conditions we rely on to process personal information**

The law on data protection sets out the reasons we may collect and process your personal data. We rely on the following legal conditions to process your personal data:

Entering into and performing a contract with you: we process personal information as is necessary to perform the membership agreement, as appropriate to your level of membership.

Legitimate interests: in specific situations, we require your data to undertake our legitimate business interests of running our business as a membership organisation, trade union and professional body, and which does not materially impact your rights, freedom or interests.

Legal compliance: if the law requires us to, we may need to collect and process your data.

Consent: we will not generally rely on consent as the basis for processing personal data but in certain situations, we can collect and process your data with your permission.

## **Retention**

All information (updated as appropriate) will be kept throughout the period of membership/time as a registered user and for such reasonable period (and to the extent necessary) after membership / registration has expired as may be needed to enable the member/registered user to access any post-membership / registration benefits. We will also retain documents (including electronic documents) containing personal data:

- (a) to the extent that we are required to do so by law;
- (b) if we believe that the documents may be relevant to any ongoing or prospective legal proceedings; and
- (c) in order to establish, exercise or defend our legal rights (including providing information to others for the purposes of fraud prevention and reducing credit risk).

## **Where your personal data may be processed**

Your information may be transferred and stored in countries outside the European Economic Area (EEA), including some that may not have laws that provide the same level of protection for personal information.

We use Mailchimp, Survey Monkey and Google Analytics to support our web-based activities. (all based in the USA). These companies are certified with the Privacy Shield which requires registered US companies to:

- better safeguard EU citizens' data
- provide clear privacy information
- limit the collection and use of data.

The Privacy Shield also allows for more robust monitoring and enforcement by the US Department of Commerce and Federal Trade Commission (FTC) which includes increased co-operation with the European and Swiss Data Protection Authorities.

## **Your Rights**

You have a number of rights with regard to your personal data. You have the right to request from us access to and rectification or erasure of your personal data, the right to restrict processing, object to processing as well as in certain circumstances the right to data portability.

If you have provided consent for the processing of your data, you have the right (in certain circumstances) to withdraw that consent at any time which will not affect the lawfulness of the processing before your consent was withdrawn. You also have the right to complain about the use of your personal information to the Information Commissioner's Office ([www.ico.org.uk](http://www.ico.org.uk)). Requests for access to personal data, should be made in writing to the union's Data Protection Officer at [dpo@aep.org.uk](mailto:dpo@aep.org.uk).

If your personal information changes or you find that any of the information that we hold about you is incorrect, please advise us of the required changes as soon as possible. This can be done in the following ways:

- Log onto our website and changing it yourself,
- E-mail to enquiries@aep.org.uk or
- Write to: The Association of Educational Psychologists, Unit 4, The Riverside Centre Frankland Lane Durham DH1 5TA

### **If you live outside the UK**

For all non-UK members

By using our services or providing your personal data to us, you expressly consent to the processing of your personal data by us or on our behalf. Of course, you still have the right to ask us not to process your data in certain ways, and if you do so, we will respect your wishes.

By dealing with us, you are giving your consent to this overseas use, transfer and disclosure of your personal data outside your country of residence for our ordinary business purposes.

We'll ensure that reasonable steps are taken to prevent third parties outside your country of residence using your personal data in any way that's not set out in this privacy policy.

We'll also make sure we adequately protect the confidentiality and privacy of your personal data.

### **Changes to this policy**

If we make any significant changes to the ways in which we process personal information, we will make the required changes to this Privacy Policy and will bring any significant changes to your attention through the web-site.