

Yateley and District u3a – Legitimate Interest Assessment – Membership Data

1. Policy

This document should be read in conjunction with Yateley and District u3a's (Y&Du3a) Privacy Policy. This legitimate interest assessment has been compiled in order to set out the reasons why Y&Du3a processes membership information.

2. Purpose Test

The reason that Y&Du3a requests personal data to be able to register individuals for membership of Y&Du3a, to communicate with members regarding the activities of Y&Du3a and to keep members informed regarding any groups or activities that they undertake.

Members information is shared with a third party processor for the supply of the u3a publication – u3a matters and each member has a choice as to whether they opt to receive this publication.

Y&Du3a also uses a third party processor for distribution of the bi-monthly newsletter. Additionally Y&Du3a uses a system to manage the membership called Beacon that is operated by the Third Age trust Trading Limited (TATTL).

Y&Du3a does not share membership information outside of the u3a organisation except for distribution of the newsletter.

Membership information is securely held and access is restricted to those who need to process data for membership purposes. Storage and processing of membership data is done in line with GDPR and safeguarding requirements. Y&Du3a operates a data protection policy and privacy policy and has sought advice from the Third Age Trust in developing these policies.

3. Necessity Test

Y&Du3a requests minimal information from members that includes personal details and contact details. This information is proportionate to the requirements of the u3a to fulfill its responsibilities in relation to being able to communicate effectively with its membership. Y&Du3a would not be able to register members or process applications without the provision of a certain amount of membership information. Y&Du3a has a duty of care to its membership and needs to retain a certain amount of personal information in order to know who its paid up members are. This is also necessary to meet the requirements for insurance provision.

4. Balancing Test

Individuals provide requested information as part of their application to join Y&Du3a. Membership is for a 12 month period, at the end of that time members have the option to renew or not together with having the opportunity to update their personal information.

The reasons for collecting personal information is explained to potential members at the point of joining. A copy of Y&Du3a's privacy policy and data protection policy is

available to all members if they wish to seek further details about how their information is used and who it is shared with.

Y&Du3a holds information securely and it will only be accessed by those who need to use it.

Membership data will not be processed for any purpose other than in connection with an individual's membership.

Communications sent will be relevant and targeted to the individual's membership activities.

u3a members will not be sent marketing materials or information that does not relate to Y&Du3a.

Y&Du3a group leaders will be informed of the importance of restricting their communications with members to that which is needed for organisation of the group.

All those who process membership information for Y&Du3a will receive an induction into the requirements of GDPR and the restrictions around data processing.

Through this assessment Y&Du3a considers that it has a legitimate interest to collect, hold and process membership information.

The document will be available to the membership via its web site and a review will be carried out ensure that legitimate interest remains a lawful basis for gathering emergency contact information.

u3a	Doc Y&Du3a Legitimate Interest assessment – Membership Data version 1	
Version	Description of changes	Date
1	This policy was adopted on	14 November 2024
	To be reviewed by 14 November 2026	