

Chew Valley u3a

LEGITIMATE INTEREST ASSESSMENT- Membership

1 Introduction

This legitimate interest assessment [LIA] has been compiled in order to set out the reasons why The Chew Valley u3a processes membership information.

It is written using The Third Age Trust LIA Sample- Membership=u3a-KMS-FRM-oo5 dated 25.11.2021

2 Purpose Test

The Chew Valley u3a requests personal data in order to be able to register individuals for membership of **Chew Valley u3a**. The personal data provided will also be used to communicate with members regarding the activities of **Chew Valley u3a** and to keep members informed regarding any groups or activities that they undertake with **Chew Valley u3a**. **Member information is shared with a third party processor for the supply of the Trust publication – Third Age Matters (TAM). Each member has a choice as to whether they opt to receive this publication.**

The Chew Valley u3a also uses **Gmail** for distribution of the monthly Newsletter.

Other than this **The Chew Valley u3a** does not share membership information outside of the U3A.

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. The Chew Valley u3a** also operates with a **Data Protection Policy and Privacy Policy** and has sought advice from the Third Age Trust in developing guidance in respect of our practice in relation to data protection.

3 Necessity Test

The Chew Valley u3a requests minimal information from potential members, which includes personal details and contact details. This information is proportionate to the requirements of the u3a fulfilling its responsibilities in relation to being able to communicate effectively with its membership. **The Chew Valley u3a's** would not be able to register members or process applications without the provision of a certain amount of membership information. **The Chew Valley u3a's** has a duty of care to its membership and needs to retain a certain amount of personal information in order to know who its members are and which members are paid up members of the u3a. This is necessary for meeting the requirements of the insurance provision for u3a members.

4 Balancing Test

The personal data requested is that which is needed for registering and processing individuals as members of **The Chew Valley U3A**. The data requested is minimal personal data and that which is needed for communicating with members. All the data gathered is from individuals who provide the information as part of their application to join **The Chew Valley u3a** Membership is for a 12 month period at the end of which time members have the option as to whether or not they wish to renew as well as having the opportunity to update their personal information.

The reasons for collecting personal information are explained to potential members at the point of joining. A copy of **The Chew Valley u3a** Privacy statement is available on our website to all members who wish to have further details about how their information is used and who it is shared with. *Members who are unhappy about their data being shared with third party processors are able to opt out of receiving those publications for which a processor is used.* **Chew Valley u3a** holds information securely and those who need to see it will only access 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. **The Chew Valley u3a group leaders/convenors** 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 the u3a will receive an induction into the requirements of GDPR and the restrictions around data processing. In addition, volunteers will be informed of the need to keep data secure and restricted to those who need access to it.

Through compilation of this assessment The Chew Valley u3a considers that it has a legitimate interest to collect, hold and process membership information. This document will be held by the Committee, be available on our website and communicated to the membership, as required. The assessment will be reviewed **every 2 years** in order to ensure that legitimate interest remains the most appropriate lawful basis for gathering membership information.

The Chew Valley u3a Management Records

u3a The Third Age Trust Knowledge Management System	
Doc Legitimate Interest Assessment Sample – Membership – u3a-KMS-FRM-005	25/11/2021
Doc LIA downloaded and draft copy prepared for The Chew Valley Committee use. cu	03.03.2024
CV u3a Committee Reviewed format of LIA-Membership [TAT version] for Website, Membership File, Privacy & Data Protection Policy links	11.11.2024
CV u3a NEXT REVIEW MAY 2025, after AGM, and every other year thereafter.	

NB:

Last draft 2024.09.09 printed to Members Secretary and held for Committee

Final draft 2024.11.11 printed for all Committee re Policy links + 2 files: Membership and Chair