



Approved date	7 <sup>th</sup> October 2024	Author	Richard Bedford	Issue
Review date	December 2026	Owner	Richard Bedford	1.1

## 1 Introduction

References to we, us or our means Stroud and District University of the Third Age, charity number [1030673](#) a charity registered in England and Wales (herein named "Stroud u3a"), You can contact us by email at [info@stroudu3a.org.uk](mailto:info@stroudu3a.org.uk). If you need to contact us by phone or post, please email us for contact details stating who you are and the reason you wish to contact us.

This legitimate interest assessment has been compiled in order to set out the reasons why Stroud u3a processes **membership information**.

## 2 Purpose Test

Stroud u3a requests personal data is in order to be able to register individuals for membership of Stroud u3a. The personal data provided will also be used to communicate with members regarding the activities of Stroud u3a and to keep members informed regarding any groups or activities that they undertake with Stroud u3a. Member information is shared with a third-party processor for the supply of the Trust publication – u3a Matters (u3aM). Each member has a choice as to whether they opt to receive this publication. Membership data is held securely on the Stroud u3a Beacon System which is operated and supplied by The Third Age Trust Limited.

Other than this Stroud 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. Stroud operates in accordance with its Data Protection and Privacy Policies and has sought advice from the Third Age Trust in developing guidance in respect of our practice in relation to data protection and privacy by adopting and adapting templates (including this one) provided by them.

## 3 Necessity Test

Stroud 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. Stroud u3a would not be able to register members or process applications without a certain amount of membership information. Stroud u3a 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, which are paid up members of the u3a and which it is legitimate to claim Gift Aid for. Holding much of this information is also necessary for meeting

the requirements of the insurance provision (via a policy held by the Third Age trust) for all u3a members and activities.

## 4 Balancing Test

The personal data requested is that which is needed for registering and processing individuals as members of Stroud u3a. The data requested is the minimum personal data and that which is needed for communicating with members. And for providing services to them and activities for them. All the data gathered is from individuals who provide the information as part of their choice to join Stroud 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 is explained to potential members at the points of joining or renewing. A copy of Stroud u3a's Privacy Policy is available 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 third-party processor is used. Stroud u3a holds information securely and it will only be accessed by those who need to see it or 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 Stroud u3a. Stroud u3a Group Coordinators 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 Stroud u3a considers that it has a legitimate interest to collect, hold and process membership information. This document will be held by the Committee and communicated to the membership, as required.

This assessment will be reviewed at least every 2 years in order to ensure that legitimate interest remains the most appropriate lawful basis for gathering membership information.