**Legitimate Interests Balancing Exercise**

**Activity to be assessed:** Light Up A Life – DM appeal

**Prepared by:** Felicity Ransom, Marketing & Database Manager

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| **Processing of an individual’s data** | **Do we have a legitimate interest, taking account of the individual’s reasonable expectations?** | **Are we sure we aren’t overriding their fundamental rights?** | **Are we confident we pass the legitimate interest test?** |
| We want to contact donors who have:   * Previously made a donation to the LUAL appeal (between 2016 – 2019) * Previously made an In Mem donation (between 2018 – June 2020) * Donors who have made at least 4 donations within the last 12 months from June 2019-June 2020 – excluding lottery members * New donors (between June 2019 – June 2020) * Requested to be sent the Light up a Life appeal * A current tribute fund * A tree of life dedication   We will exclude:   * Postal Opt Outs * Under 16s * Newsletter only – no other mailings * FPS Registered * No Appeals * No Requests * LUAL Standing Orders * Any donor who has had a bereavement at the hospice in the past 12 months (they will receive a separate invite without a direct ask) * Any in memory donors from the past 3 months * Any recent major donors from the past 3 months   The letter will ask them to consider making a donation to the LUAL appeal, whilst at the same time helping to support other patients and families who will access the hospice’s services over the Christmas period. | Yes, we have a legitimate interest.  Sending the letter is direct marketing, which may be considered a legitimate interest.  The individuals would reasonably expect us to send the letter because:   * They have donated to the appeal in previous years. * They have donated in memory of a loved one and would expect to be given an opportunity to remember them at Christmas time. * They have donated to the hospice previously and would expect to contacted again by the hospice for support. | Yes, we are sure that we are not overriding their fundamental rights.  The individuals have not objected to receiving direct marketing – they have previously been given an opportunity to opt out of direct marketing.  The letter we want to send is relevant.  Information about how to opt out of further communications will be included in the letter.  We will manually remove from the mailing list anyone we believe to be in vulnerable circumstances, in line with guidance from the Institute of Fundraising. | Yes |

**Approved by:** Alice Atkinson, Director of Income Generation & Communications **Date:** 14.9.20