**Legitimate Interests Balancing Exercise**

**Activity to be assessed:** Cost of living temporary regular giving direct mail appeal

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

**Details of the proposed processing:**

We want to contact donors with a cost of living appeal, asking supporters if they are able to support Bolton Hospice through the cost of living crisis by signing up to a temporary monthly donation (starting Aug 3rd 2023 – July 3rd 2024)

The mailing list will be pulled from the current donor database of those who have donated at least twice with their most recent donation within the previous 4 years from Jan 2019-April 2023. Weekly lottery players, current regular giving supporters & major donors (who have donated over £1000 in the past year – BA income stream) will be excluded.

New donors that have given more than £10 from Jan 2022 – April 2023 will also be selected excluding weekly lottery players, regular givers, major donors & new event supporters (ie – strictly ticket holders, MMW sign ups)

The following exclusions will apply:

* Under 16s
* Postal Opt Out
* FPS registered
* Weekly lottery members
* Current regular giving supporters (SAN/RG)
* Major donors (over £1000 in the past year)
* New event supporters

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| **Purpose Test** | **Necessity Test** | **Balancing Test** |
| **Do we have a legitimate interest, taking account of the individual’s reasonable expectations?** | **Is the processing detailed above necessary to achieve the purpose?**  **Could the purpose be achieved by some other reasonable means without processing the data in this way?** | **Are we sure we aren’t overriding the individual’s fundamental rights or freedoms?** |
| 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 us in the recent past * In the acknowledgement of their initial & subsequent donation they were informed that we will send them upcoming fundraising activities.   They were directed to our privacy policy and directed on how to opt out of further communications and have not done so. | Yes, processing is necessary to achieve the purpose of keeping the recipient informed of hospice activity & future fundraising activities  This purpose could not be achieved without processing the data in the manner specified. | Yes, we are sure that we are not overriding their fundamental rights.  The individuals have not objected to receiving 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. |

**To be completed by Alice:**

Purpose test – is there a legitimate interest behind the processing? **✓** Yes □ No

Necessity test – is the processing necessary for that purpose? **✓** Yes □ No

Balancing test – is the legitimate interest overridden by the individual’s interests, rights or freedoms? □ Yes **✓** No

**Outcome:**

**✓** Approved □ Not Approved

**Date:** 26.5.23