**Legitimate Interests Balancing Exercise**

**Activity to be assessed:** Autumn 2024 Newsletter & LUAL appeal mailing to supporters

**Prepared by:** Sarah James, Senior Marketing & Database Co-ordinator

**Details of the proposed processing:**

We want to contact donors with our bi-annual newsletter and Light up a Life appeal. The newsletter will contain information about hospice updates, how donor support is helping and upcoming fundraising activities. The mailing will also include our Light up our annual Light up a Life appeal.   
The mailing list will be pulled from the current donor database of those who have made a donation within the last 4 years. We will be using Dataro, a fundraising intelligence platform to support our data selection.   
The mailing will exclude those who have requested not to receive postal mail. Anyone who has requested ‘Newsletter Only’ and ‘No appeals’ will just receive the newsletter.   
We will also be contacting companies and schools who have supported the hospice in the last two years. This is to keep companies and local schools up to date with our news, upcoming events and raise awareness of our Light up a Life appeal.

The following segment hierarchy will apply:

**Mailing - version one**

* Those who **previously donated to a LUAL appeal** (01.01.2019 – to date)
* Those who have **previously donated to LUAL with a tribute name** (01.01.2019 – to date)
* Those who have **previously donated to LUAL without a tribute name** (01.01.2019 – to date)
* Those who have **requested to receive a LUAL mailer**
* Those who have **donated in memory** from 01.01.2019 – 18.08.2024

**Mailing – version two**

* **Lottery players** – (supporters who are a current lottery player)
* **Regular givers** (supporters who have a current standing order/direct debit)
* Supporters who have **organised and supported fundraising** **events** from 01.01.2019
* **New donors** from 01.09.2023
* **General Supporters** – those who have given any donation within the last 4 years that don’t fall into any of the above segments (01.01.2019 to date)
* **Companies** **and schools** who have given at least one donation from (01.01.2022 to date)
* **Major Donors** – supporters who are identified as a Major Donor

The following exclusions will apply:

* Any supporters who have made an in memory donation within six weeks of the mailing landing
* Any supporters who receive an invitation to attend the October Remembrance Service
* Under 18’s
* Postal Opt Out
* No newsletter attribute
* No appeal attribute
* FPS registered
* New SEC lottery members from 3 months of anticipated newsletter landing date

|  |  |  |
| --- | --- | --- |
| **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 mailing 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 or (in relation to the lapsed donors) they would expect us to reach out to them as past donors. * In the acknowledgement of their initial & subsequent donation they were informed that we will send them information about how their support is helping and 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 and our Light up a Life appeal.  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:** 22.8.24