

Member Privacy Notice: Further Information

This document should be read in conjunction with the Member Privacy Notice, and the Inn's other Data Protection policies and notices which can be viewed on the Inn's website: <https://www.middletemple.org.uk/about-us/data-protection>.

This document provides additional, detailed information about the personal data that the Inn uses in relation to membership activities.

If you would like more information please contact the Inn's Data Protection Officer at data.protection@middletemple.org.uk

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Schedule 1: Categories of personal data

The following list details the categories of personal data that the Inn may collect and hold on members, applicants and scholarship applicants.

Personal information

- Your name and title, including any change of name information
- Photograph
- Date of birth
- Contact details, including address, email address and phone number
- MyBar Reg Number (if applicable)
- Identity documents
- Financial and transaction data, including bank account details and information about payments to and from you

Inn membership information

- Inn membership number
- Admission date and Call date
- Admission application form, Call to the Bar application form and scholarship application form(s)
- References from applications to join the Inn, Call or scholarship applications [no longer collected for new applicants]
- Notes from scholarship interviews (where applicable)
- Information on scholarship(s) awarded (where applicable)
- Proof of qualification documents (e.g. degree certificates)
- Details of academic or misconduct investigations and proceedings
- Details of professional or regulatory investigations or proceedings
- Details of bankruptcy or similar arrangements
- Details of any refusal of membership or expulsions from any of the Inns of Court
- Username for accessing the member area on the website
- Events attended, including Qualifying Sessions
- Training sessions attended, or voluntary roles
- Inn appointments
- Feedback and survey responses
- Marketing and communications data, including your preferences in receiving marketing from the Inn and third parties

Education and career progression information

Where relevant, details of your:

- Qualifications and education institutions attended, including dates
- Pupillage and tenancy information, including work related contact details
- Curriculum Vitae (CV) or resume and professional profile
- Professional appointments

Information about your family, lifestyle or social circumstances

In certain circumstances we will also hold limited information about your spouse, partner, or civil partner, or other individuals. This is collected, for example, where you name them as an emergency contact.

Your image

When this has been captured on the Inn's CCTV cameras.

Basic information about your activities in the Inn

Including use of information and communication systems, such as access times from signing in and out of buildings and swipe card access, or an IP address if you access information from a device, or usage records for systems. The Inn keeps a record of individuals signing in and out of the Inn for health and safety purposes, in case they are needed in the event of an evacuation or for contact tracing during the COVID-19 pandemic.

Special category and criminal offences data

The Inn may also process some kinds of more sensitive information about you that is classed as 'special category' data, and which receives additional protections under law, and in terms of our processing of it.

This includes data about:

- Criminal convictions and offences
- Information about health conditions which might pose a risk to any member of the public or impair judgement as a practising barrister
- If you share it voluntarily, information about your race or ethnicity, nationality, gender and disability

Schedule 2: Summary membership data retention schedule

The following table provides a summary of the records containing personal data in the membership and education records retention and disposal schedules. The full schedules are available upon request from the Data Protection Officer.

Class Code	Record	Retention Period
MB1	Basic personal details	
1.1, 1.4, 1.5, 1.7, 1.10	Name, title, date of birth, member status, membership number, completed admission & call application forms for successful applicants, proof of change of name.	Keep permanently. Transfer to Inn's archive at end of membership.
1.2	Contact details, including permanent address, email, telephone, greeting, and a term time address if different to main contact details.	Keep until superseded, then destroy out of date information. Keep most up to date information for 1 year after end of membership, then destroy.
1.3	Protected characteristics, including gender, age, disability information, ethnic origin, nationality, dietary needs, preferred language.	Keep until superseded, then destroy out of date information. Keep most up to date information for 1 year after end of membership, then destroy.
1.6, 1.8, 1.9	Photograph, proof of identity, references.	Keep for 1 year after end of membership, then destroy.
Class Code	Record	Retention Period
MB2	Education history	
2.1, 2.2, 2.3	Academic qualifications; membership of professional bodies; professional qualifications.	Keep permanently. Transfer to Inn's archive at end of membership.
2.4, 2.5	Certificate of standing, including certificate number, date awarded; Proof of qualifications or status.	Keep for 1 year after end of membership, then destroy.
Class Code	Record	Retention Period
MB3	Training history	
3.1, 3.2, 3.3	Attendance at Qualifying Sessions, training courses attended, support schemes members have taken part in.	Keep for 1 year after end of membership, then destroy.
Class Code	Record	Retention Period
MB4	Professional information	
4.1, 4.2	Admission date, Call to the Bar date.	Keep permanently. Transfer to Inn's archive at end of membership.
4.3	Call certificates.	Keep for 1 year after end of membership, then destroy.
4.5, 4.6, 4.7, 4.8, 4.9, 4.11	Pupillage information, Chamber information, professional appointments, Inn appointments, Bench call date, member biography.	Keep permanently. Transfer to archive at end of membership.
4.10	Bar Council membership number.	Keep for 1 year after end of membership, then destroy.

Class Code	Record	Retention Period
MB5	Disciplinary record & fitness to practise. See also Supplemental Privacy Notice.	
5.1	Information declared at admission or Call (via DBS checks) relating to criminal convictions and offences, academic, misconduct, professional or regulatory investigations and proceedings, bankruptcy or similar arrangements. May include information about health conditions needed for fitness to practise requirements.	Keep permanently. Transfer to Inn's archive at end of membership.
5.2	Disciplinary action outcomes. Record of hearing date and result e.g. dismissal, suspension, disbarment/expulsion.	Keep permanently. Transfer to Inn's archive at end of membership.
5.3	Administrative records relating to DBS checks.	Keep for 1 year after date of application, then destroy.
5.4	Result of DBS verification.	Keep permanently. Transfer to Inn's archive at end of membership.
Class Code	Record	Retention Period
MB6	Financial information	
6.1	Prizes and scholarships: summary.	Keep permanently. Transfer to Inn's archive at end of membership.
6.2	Prizes and scholarships: detail.	Keep for 1 year after end of membership, then destroy.
6.3	Pupillage support grants & hardship fund: summary.	Keep permanently. Transfer to Inn's archive at end of membership.
6.4	Pupillage support grants & hardship fund: detail.	Keep for 1 year after end of membership, then destroy.
Class Code	Record	Retention Period
MS3	Understanding the Inn's members and the services that they require	
3.1	Conducting surveys of the Inn's members.	Keep report permanently, transfer to Inn's archive.
Class Code	Record	Retention Period
MS4	Communicating with the Inn's members	
4.3	Managing publication of the "Middle Templar", records including correspondence with authors.	Keep for 3 years after publication of magazine, then destroy.
4.4	The Inn's annual magazine, the "Middle Templar".	Keep permanently, transfer to Inn's archive.
Class Code	Record	Retention Period
MS5	Running events and initiatives for members	
5.4	Administration of royal events and grand day, records including invitations, RSVP cards, tickets, function sheets and seating plans.	Keep permanently, transfer to Inn's archive.
5.5, 5.6	Administration of events and initiatives for the Inn's members (other than royal events and grand day), records including invitations, RSVP cards, tickets, guest booklets, function sheets, seating plans; Bench calls records.	Keep for 7 years from the date of event, then transfer to the Inn's archive for review.

5.7	Managing guest information for events.	Keep for 1 year from the date of event, then destroy.
5.8	Recordings and photographs of events.	Keep permanently, transfer to Inn's archive.
5.9	Consent forms and correspondence for individuals agreeing to being recorded or photographed at events or for publications; including correspondence re copyright.	Keep for 1 year after the end of membership or end of use of images, whichever is longer.
Class Code	Record	Retention Period
MS6	Organising visits outside of the Inn	
6.1, 6.2	Administration of Amity visits abroad; administration of circuit visits.	Keep for 7 years from the date of event, then transfer to the Inn's archive for review.
Class Code	Record	Retention Period
ED2	Access and outreach	
2.1	Administration of access and outreach events.	Keep until end of legal year of event, then destroy.
Class Code	Record	Retention Period
ED3	Admissions	
3.2	Admissions administration, including enquiries, correspondence, requests for missing information from applicants.	Keep for 6 years from end of legal year of application, then destroy.
3.3	Incomplete admissions applications.	Keep for 1 year from end of legal year application started, then destroy.
3.4	Unsuccessful admissions applications. Records including: list of unsuccessful applicants; completed application forms, proof of identity and qualifications documents, references, correspondence, including complaints; final responses to admissions complaints.	Application form & associated documents: keep for 6 years from end of legal year of application, then destroy. Other records: keep for 1 year from end of legal year of application, then destroy.
Class Code	Record	Retention Period
ED4	Call	
4.3	Incomplete call applications.	Keep for 1 year after end of calendar year, then destroy.
4.4	Call lists.	Keep permanently, transfer to Inn's archive.
Class Code	Record	Retention Period
ED5	Educational support	
5.1.1	Administration of Qualifying Sessions organised by the Inn.	Tickets and attendance records: keep for 7 years from end of legal year, then destroy; spreadsheet of special requirements/reserved seats: keep until end of legal year, then destroy.
5.1.2	Administration of Local Qualifying Sessions.	Keep for 7 years from end of legal year, then destroy.

5.1.3	Administration of residential weekends.	Attendance records: keep for 7 years from end of legal year, then destroy; other records: keep until the end of the legal year, then destroy.
5.1.4	Administration of the sponsorship scheme.	Keep for 5 years from end of legal year of application, then destroy.
5.1.5, 5.1.6	Administration of marshalling; administration of the Middle Temple mooting competition.	Keep for 5 years from end of legal year, then destroy.
5.1.7	External mooting competitions.	Travel expenses: keep for 6 years from end of current financial year, then destroy; other records: keep for 3 years from end of legal year, then destroy.
5.2.1, 5.2.2, 5.2.3	Administration of training the trainers; Pupils' courses; Mock pupillage interview scheme	Keep for 3 years from end of legal year, then destroy.
5.2.4	Administration of Pupil supervisors.	Briefing attendance lists: keep for 6 years from date of delivery, then destroy; other records: keep for 1 year from end of legal year, then destroy.
5.2.5	Administration of the New Practitioners' Programme (NPP).	Keep for 3 years from date of delivery, then destroy.
5.2.6	Administration of CPD provided by the Inn, including CPD day and guest lectures.	Keep for 3 years from date of delivery, then destroy.
Class Code	Record	Retention Period
ED6	Member financial support administration	
6.1a, 6.2a, 6.4a	Applications for scholarships and awards, prizes, and Access to the Bar awards.	Keep for 1 year from end of current legal year, then destroy.
6.1b, 6.2b, 6.4b	Administration for scholarships and awards, prizes, and Access to the Bar awards.	Keep for 6 years from end of current legal year, then destroy.
6.3	List of prize winners.	Keep permanently, transfer to Inn's archive.
6.5	Administration of Keble awards.	Keep for 6 years from end of current legal year, then destroy (application forms are destroyed immediately).
6.7, 6.8	Pupillage support grant and pupillage hardship fund administration.	Keep for 1 year from the end of the current legal year, then destroy.
6.9	Assessor/Interviewer bundles.	Keep for 1 year from end of current legal year, then destroy.

Schedule 3: Purposes of processing personal data

For some processing activities, we consider that more than one lawful basis may be relevant - depending on the circumstances.

Purposes of processing	Lawful basis				
	We are permitted to process your personal data because				
	1. You have given your consent to the processing	2. It is necessary for the performance of a contract with you	3. It is necessary for us to comply with a legal obligation	4. It is necessary for our legitimate interests or those of third parties	5. It is necessary to protect your vital interests (or those of someone else)
a) Admission to the Inn, Call to the Bar, scholarship applications					
1. Administering your application to join the Inn, to be Called to the Bar, or for a scholarship		✓		✓	
2. Obtaining, considering and verifying your academic and professional history and references				✓	
3. Reviewing and confirming your identity			✓		
4. Collecting the Admission Declaration and Call Declaration and assessing for compliance with the Core Duties set by the Bar Standards Board and the fit and proper test			✓		
5. Preventing fraud			✓	✓	
6. Processing any fees associated with your applications		✓		✓	
7. Assessing your financial requirements as part of scholarship applications		✓		✓	
8. Developing, operating and collecting feedback on admission, Call and scholarship processes				✓	
b) General membership management and administration					
9. Communicating with you and providing you with information in connection with your membership or engagement with us from time to time		✓		✓	
10. Notifying you about changes to our membership terms or privacy policy		✓	✓	✓	

11. Providing educational or training services to you as a member of the Inn		✓			
12. Asking you to complete surveys about your membership				✓	
13. Running events for members of the Inn		✓		✓	
14. Complying with legal or regulatory obligations or requests, made by for example, the Bar Standards Board or governmental agencies			✓		
15. Managing our health and safety compliance obligations			✓		
16. Contacting the appropriate person in the event of an emergency concerning you					✓
17. Administering our insurance policies				✓	
18. Determining whether any adjustments are necessary to enable you to visit the Inn or participate fully in member life		✓	✓		
19. Preparing risk assessments to prevent injuries at the Inn			✓		
20. Handling complaints, including investigating issues, considering appropriate resolution and mitigating actions and reviewing outcomes				✓	
c) Security and governance					
21. Monitoring the security of the Inn's physical premises (including car parks) and systems, networks and applications			✓	✓	
22. Identifying and authenticating visitors to the Inn				✓	
23. Ensuring compliance with the Inn's policies and procedures				✓	
d) Day-to-day business operations					
24. Implementing, adapting and enhancing systems and processes to develop or improve our business and/or make your membership easier or more enjoyable				✓	
25. Managing, planning and delivering our business, sales and marketing strategies				✓	
26. Supporting our diversity programmes and member support networks and initiatives	✓			✓	
27. Publishing external facing materials for marketing and public relations purposes such as where we mention you in	✓			✓	



the context of the Inn's projects and initiatives in marketing materials, social media posts or press releases					
28. Administering travel and accommodation arrangements		✓	✓	✓	
29. Monitoring attendance on site for fire evacuation or COVID-19 test & trace purposes			✓	✓	✓

Schedule 4: Purposes of processing special category personal data

Purposes of processing	Special category lawful basis			
	We are permitted to process your personal data because			
	1. You have given your explicit consent to the processing	2. It is necessary to protect the vital interests of the data subject or another person or they are physically or legally incapable of giving consent	3. It is necessary for our establishment, exercise or defence of legal claims	4. It is necessary for reasons of substantial public interest
a) Admission to the Inn, Call to the Bar, scholarship applications				
1. Conducting verification and vetting, including criminal background and credit checks where required for the fit and proper test as required by the Bar Standards Board				✓
b) General membership management and administration				
2. Contacting the appropriate person in the event of an emergency concerning you		✓		
3. Administering our insurance policies				✓
4. Determining whether any adjustments are necessary to enable you to visit the Inn or participate fully in member life	✓			✓
c) Security and governance				
5. Identifying and authenticating visitors to the Inn	✓			✓
d) Legal and regulatory compliance and responsibilities				
6. Equal opportunities reporting				✓
7. Investigating, evaluating, demonstrating, monitoring, improving and reporting on the Inn's compliance with relevant legal and regulatory requirements			✓	
e) Day-to-day business operations				
8. Supporting our diversity programmes and member support networks and initiatives	✓			✓
9. COVID-19 contact tracing in the case of a positive test		✓		✓