



PSG MEMBERSHIP MANAGEMENT POLICY

Version 1.2

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INTRODUCTION

The Pacific Seabird Group (PSG) maintains an up-to-date membership database of all its current and expired members. PSG membership varies from year to year and has contained more than 500 members; average is 300-400. Over the years, PSG has moved from a manual database to online management applications to assist with payment of membership dues, membership voting, and annual meeting registration and planning (e.g., automatic member rates during registration). In 2017, the PSG database was transitioned from RegOnline to Cvent, another commercial membership management application.

The PSG membership database contains members' phone number(s), email address, affiliation, and street address, plus other member fields such as region, number of years a member, and status (current or lapsed). In the case of auto-renewal, the application also stores payment information; PSG does not store personal financial information (like credit card numbers).

The PSG Membership Management Policy was created in response to concerns about the use of the PSG member information for surveys and a request for member information from a non-member. The purpose of the policy is to protect the personal information of PSG members and prevent the accidental disclosure of this information because there was no guidance on how to properly store or share this information. The policy provides a process for decisions by EXCO regarding the use of the membership database and guidance for distribution if a request is approved by the PSG Membership Coordinator.

ADMINISTRATION

The PSG Membership Coordinator has the primary responsibility to ensure that the PSG membership database is secure and up-to-date, including changing the password for security reasons. Others with access to the database typically are: PSG Chairs (Chair-Elect, Chair, Past Chair), PSG Secretary, PSG Local Chair, and the event planner (if applicable) to assist with annual meeting planning and in case the Membership Coordinator is not available to access the database for immediate requests (e.g., during check-in at the annual meeting).

All requests for membership information will be archived by the Membership Coordinator. Additionally, the latest password protected membership file (all members) will be stored on PSG's cloud server to be used as back-up, with access provided to the Chairs, Secretary and Membership Coordinator only.

PRIVACY POLICY

PSG respects the confidentiality of member information and maintains an unwavering commitment to protect the personal information of its members. PSG may share personal information within PSG for organisational purposes (e.g., developing ballots for voting) and with service contractors for the annual

meeting. Under no circumstances will PSG share the membership database with external organizations. The PSG membership database exists for the sole purposes of a) contacting members about Society business (e.g., elections, Pacific Seabirds submissions) and b) providing membership renewal reminders.

SHARING PERSONAL INFORMATION WITHIN PSG

All requests to use the PSG membership database must be submitted in writing to the PSG Secretary who will bring the request to the PSG Chairs (Chair Elect, Chair, Past Chair) for a decision. The request must include the following:

1. Purpose of request, including how the membership information will be used
2. Category of members requested (lifetime, student, regular, or all)
3. Status of members requested (current, lapsed, or all)
4. Region requested (specific region only, or all)
5. Date needed (e.g., 2 Oct 2017)

Once the email address and identity of the requesting person is verified, the Chairs will either approve, ask for additional information, or deny the request. The PSG Secretary will provide notification of the decision.

If the request is approved, the PSG Membership Coordinator will prepare the information using the following guidelines to ensure the highest protection of the electronic records:

1. Prepare and save each membership download in a password-protected file, changing the password for each new download.
2. Sending the requestor the password over text message only
3. With any email that contains PSG membership information, this standard privacy disclosure must be included:

“The information contained in this transmission may contain privileged and confidential information, including member information protected by federal and state privacy laws. It is intended only for the use of the person(s) named above. If you are not the intended recipient, you are hereby notified that any review, dissemination, distribution, or duplication of this communication is strictly prohibited. If you are not the intended recipient, please contact the sender by reply email and destroy all copies of the original message.”

CONTACT INFORMATION

For more information or to submit a request for the PSG membership database, please write to the PSG Secretary. Email: secretary@pacificseabirdgroup.org

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Approved by EXCO on 15 December 2017