

## Data Protection Guidance for Volunteers

### Scope

This data management guide has been produced to help APM volunteers by signposting how staff can support their role. It sets out some generic data protection advice and some FAQs to answer common queries.

### Introduction

Personal data is about you. It is anything that relates to you as an identifiable individual. It's not just your contact details but can include your finances, your health, your views, opinions and preferences. Data protection is about protecting you from the misuse and mistakes others might make with your information.

The personal data managed by volunteers on APM's behalf needs to be given robust protection and be processed fairly in accordance with UK GDPR (The UK General Data Protection Regulation) principles. This necessitates some sensible and proportionate controls on access and use which are set out in this document.

Our overriding aim is to manage personal data in accordance with the UK GDPR. Remember, APM must protect YOUR personal data to the high standards you would expect. A failure to do so creates regulatory risks but more importantly can irreparably damage the reputation of APM with its members and stakeholders.

### Overarching Principles

- APM staff and volunteers must exercise caution when using personal data.
- Always be sure that you have the right to use the data for the intended purpose.
- Always ensure you understand the requirements and check if unsure.
- Always make sure that data is stored and transmitted securely.
- Ask yourself if you would be happy with your data being used in this way? Are you comfortable that all others would feel the same?
- For data quality and data security, APM should manage central lists with the main database (CRM) being the 'single source of truth'.
- Formal communications such as invites to events should be made by APM.

### Reference Material and Background

- The key data protection principles are largely common sense. See **Appendix 1** – make sure you understand and apply them. Always check if you are unsure.
- Some generic 'top tips' to help you think about how to protect personal data are included in **Appendix 2**.
- MSTeams is a key tool and contains contact details and other personal data. The MSTeams 'Terms of Use' should be reviewed and confirmed understood.
- The [APM privacy statement](#) sets out how we manage personal data. Please read it.

## Frequently Asked Questions and APM Support for Data Requests

The following sets out the answers to common queries and how APM can support volunteers' data requests.

Common questions and queries	Answers and how we can support you
<p>Can I use and store my own contacts?</p>	<p>There is no bar on individuals sensibly managing their own contacts. There is no problem if you hold contacts in your email software (e.g. Outlook) of people who <u>you know are happy to be contacted</u>.</p> <p>Where someone has agreed to be contacted by you then you can go back to them on related matters. Of course, you still need to be careful about what you use their data for and to whom it can be passed. Seek guidance if unclear and refer to the DPA principles in Appendix 1.</p> <p>Regional Networks and Interest Networks must not maintain local lists or databases of personal data, for example, contact lists of corporate partners or event attendees (see below).</p> <p>Regional Network and Interest Network secretaries can maintain email distribution lists of committee members in order to arrange meetings etc.</p>
<p>Can the Regional Network / Interest Network maintain our own lists of personal data? For example, local corporate contact details.</p>	<p>Apart from as detailed above - no. Access and use to member and corporate personal data must be managed in accordance with UK GDPR principles. Data quality and security is compromised if it is held locally and there can be no assurance over its use. There must be one 'source of the truth' which is updated centrally and this is APM's CRM database.</p>
<p>I need the most up-to-date contacts in order to send out an invitation to an event?</p>	<p>All invites to events must be centrally managed by APM. This ensures that the invite goes to the most up to date contacts. You can forward the invitation to any personal contacts.</p>

<p>I think I have more up-to-date details than APM. Can you update the central database with them?</p>	<p>Please pass on the details and we will check. If there is a discrepancy we will check with the individual and update the database. We may ask you to encourage the individual to contact us directly or to register or update their account on the website. If they are not on the database, we can't assume that because they have given you their details that APM can add them to the database. For example, we need their specific preferences on the database to market to them.</p>
<p>I want to discuss an opportunity with local corporate partners and affiliates. Please send me their details.</p> <p>Please can you advise the best contact at an organisation?</p> <p>I used to deal with XXX at XXX but they don't respond. Can you give me another contact?</p>	<p>We know that many corporate contacts are very protective of their data and do not want their details passed on widely. Several have refused to have them passed on and we must respect their right to say no.</p> <p>If you are happy to pass your details to them, we will forward on and encourage them to make contact if they wish.</p>
<p>Is XXX a corporate partner/affiliate /HEI?</p>	<p>There is a <a href="#">list</a> on APM website which is always kept up to date.</p>
<p>Is XXX an individual member of APM?</p> <p>Is XXX an RPP?</p> <p>Is XXX a ChPP?</p>	<p><a href="#">RPPs</a> and <a href="#">ChPPs</a> have <a href="#">public registers</a> which they can opt into and which can be searched on the APM website. Honorary Fellows are also listed on the website. There is no public register for individual members (students, associates, MAPMs and FAPMs) and we can't release individuals' status without their consent; which might be appropriate to source.</p>
<p>How many people did our email go to?</p>	<p>APM can provide stats on the number of emails sent and the CTOR (Click To Open Rate).</p>
<p>Can we have a copy of the delegate list?</p>	<p>It is common practice to share delegate lists with those attending for personal networking – these comprise name and company. Individuals have the right to opt out of this. Contact details are not shared more widely with Regional Networks, Interest Networks or sponsors and speakers. Remember that the data should not be held locally and the data is unlikely to be available for secondary use. Please discuss with us what you want to do and if there is another way to help.</p>

<p>Can APM ask its members if they give consent to be contacted by their Regional Network or Interest Network representative? If they consent, can we make contact direct?</p>	<p>Communications about events and formal opportunities can be managed centrally and we can email them directly on your behalf.</p> <p>Managing consent is complex and there would need to be a process for storing consent and a process for its review and removal.</p> <p>Regional Network and Interest Network officers can be contacted via the website and we can encourage people to get in touch with you. We are happy to pass your details to them.</p>
<p>The CRM doesn't easily store the various local / regional offices of corporate partners. How can we manage this?</p>	<p>This is a known issue which is being examined. APM staff will be able to manage a central 'work around' and support you with your needs. Please ask for assistance.</p>
<p>Is MSTeams and Sharepoint secure?</p>	<p>A connection between your device and MSTeams is considered to have suitable levels of IT security. Please do not download and store any personal data locally. You should have a password, username, or PIN controlled access to your device. We will be rolling out Multi Factor Authentication (MFA) in the first part of 2024 for added security. Please ensure you read 'MS Teams Terms of Use' as well.</p>
<p>Are there any restriction on using the contact details in MSTeams?</p>	<p>Yes – please read the 'MSTeams Terms of Use'. Individuals give their contact details for APM volunteer business and there should be no wider use.</p> <p>APM administrators (Main Owners) for each individual MSTeams area should review and maintain the content of each project. This should include deleting users who are no longer active.</p>

**Data Protection Principles**

- Processed lawfully, fairly and in a transparent manner in relation to individuals (i.e. *can we do this and is it reasonable? Does the individual know?*).
  - Collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes (i.e. *only used for the purpose collected*).
  - Adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed (i.e. *only keep what you need*).
  - Accurate and, where necessary, kept up to date (i.e. *keep it accurate*).
  - Not kept for longer than is necessary (i.e. *check but delete what we don't need*).
  - Processed in a manner that ensures appropriate security (i.e. *look after it*).
-

## Data Protection Top Tips

DO's	DON'Ts
DO ensure you have an agreed process and approval before sharing personal data or using it for a new purpose. Always consider privacy issues when creating new procedures and check with APM if unsure.	DO NOT forget information is a key asset we cannot afford to lose. The trust of our customers and significant fines are at stake.
DO make sure you double check before sending emails that you have entered the correct recipient.	DON'T include multiple email contact details in the 'to' or 'cc' fields – protect email addresses wherever necessary by using the 'bcc' field.
DO ensure personal data is secured in transit by encryption using secure passwords and secure FTP sites. Check with APM if you are unclear.	
DO create lengthy passwords (9 characters or more) containing both letters, numbers and symbols. Choose something which makes sense to you but is not easy to guess.	
Save files to network drives and not to local hard disks. Do not use memory sticks or laptops unless they are encrypted (APM standard) and this process has been approved.	
DO read the APM Privacy Statement and the MSTEams Terms of Use before using MS Teams and Sharepoint.	