

## SOCIETY POLICY

### USE OF MEMBER DATA

#### I. PREFACE

A. Definitions:

As used in this policy,

"Membership database" refers to a central repository for data concerning the members of ASME, in any form or format.

"Member data" refers to information regarding individual members of ASME. This may include information of a personal nature, such as name, address, date of birth, employment information, etc.; or information pertaining to an individual's membership in ASME, such as years of membership, membership grade, offices held, etc.

"Unit" or "units" refers to any ASME internal organizational entity formally recognized by the Board of Governors for the purpose of carrying out the Society's mission (e.g., sectors, districts, sections, subsections, groups, technical divisions, technical groups, institutes, and technical chapters).

- B. Providing ASME member data to the Society leadership entails some risk of misuse, whether intentional or unintentional.
- C. Use of ASME member data by the Society's leadership is perceived as a beneficial volunteer management tool to assist the organization and operation of the units of ASME.
- D. The membership database contains confidential and proprietary information about ASME Members.

#### II. PURPOSE

- A. To amplify the applicability of Society Policy P-15.8, "Conflicts of Interest," with regard to the handling and use of ASME member data.
- B. To provide guidelines for the development and use of mailing lists or other listings developed from member information contained in the membership database for the internal use of the units of ASME and to establish the relationship with respect to the mailing lists covered by Society Policy P-12.8, "Distribution of Mailing Lists."
- C. To present procedures and guidelines to minimize the risk of misuse.

### III. POLICY

- A. The membership database and the information contained therein are the exclusive property of ASME; the member data contained within the membership database may be made available on loan to ASME Members in unit leadership positions solely for internal use by units of ASME.
- B. The following limitations apply to the use of member data:
  1. The member data provided to ASME members in leadership positions is for the exclusive internal use of units of ASME.
  2. The member data provided to ASME members in leadership positions may be used to analyze the demographics or other dimensions of ASME units, to produce rosters and other listings, and to generate mailing lists for use within ASME units.
  3. Any mailing labels or lists generated from this data are for the exclusive, internal use of ASME units. The data may not be in any way exchanged, sold, lent, given, or bartered to any other person, company, or organization except as provided herein for transfer to other members or to mailing-services for the sole and specific purpose of processing mailings for use within ASME units. All other uses of ASME mailing lists, in whole or in part, shall be governed by Society Policy P-12.8, "Distribution of Mailing Lists." Further direction or information for external uses of mailing lists must be obtained from the Director of Marketing in accordance with Society Policy P-12.8.
  4. Copies of Member Data
    - a. Access to member data for a unit will be made available to up to six members in leadership positions of those units defined in paragraph IV.A.1 of this Society Policy upon verification of the requirements in paragraph IV.A.2 of this Society Policy.
    - b. Copies of each unit's member data may be made for backup or archive purposes, or as part of analyzing the unit's membership or producing rosters or other lists. All copies and archived data, as well as any lists, rosters and reports containing information on individual ASME members, are bound by the same limitations and restrictions as the original data. The original recipient of the data is responsible for maintaining and ensuring control of the data in accordance with this Society Policy. This responsibility may not be transferred.
    - c. An ASME unit may provide copies of name and mailing address information only to other organizations for the sole and specific purpose of providing services for correspondence internal to that unit of ASME upon approval of the Director of Marketing. The Director's approval is contingent on receipt from the proposed organization of signed agreements to comply with this Policy and with Policy P-15.8, "Conflicts of Interest."

5. ASME does not provide any warranty as to the accuracy of the data contained within the membership database, nor does it warrant that the data format is compatible with any particular brand or type of computer system or software.
6. The performance of all recipients of member data under the terms of this Society Policy shall also fall under ASME Policy P-15.8, "Conflicts of Interest." The recipients' execution of the agreements to this Society Policy and to Society Policy P-15.8, "Conflicts of Interest," is required.

#### **IV. PROCEDURE**

##### **A. Provision of Member Data to ASME Units.**

1. Access to current member data by units of the Society is provided to all vice presidents, district leaders, section and technical division chairs, and not more than six members in leadership positions in each unit of the Society, as defined in I.A above and to leaders of other units approved by the Knowledge and Community Board of Directors.
2. Prior to authorizing access to member data verification will be made of each individual's acceptance of this Society Policy, of Society Policy P-15.8, "Conflicts of Interest" and that the individual's member record contains a current position code for one of the leadership positions as required by this Society Policy.
3. Upon receipt of the current member data, the authorized individuals shall make the necessary provisions to avoid any use of outdated information. Such previous versions or archive copies shall continue to be subject to the control requirements of this Society Policy.
4. The Knowledge and Community Board of Directors will determine what information from the membership database will be included in the member data provided to units. The sector will annually review the data provided to units under this Society Policy.

##### **B. Use of the Member Data.**

1. Questions regarding uses of member data should be directed to:

ASME  
Managing Director, Knowledge & Community  
Three Park Avenue  
New York, NY 10016-5990

2. Transfers of member data onto a hard disk or any other form of shared resource system, including, but not limited to a mainframe computer, require appropriate security provisions to protect the data from unauthorized access or use.
3. Upon request by the Executive Director of ASME or his/her designee, all data and any copies made thereof shall be immediately returned to the

Society or destroyed. At that time, the Member responsible for the data shall certify in writing to the Managing Director, Knowledge and Community all original data and any copies have been returned or destroyed and that all of the data that had been loaded onto a hard disk or other form of shared resource system has been permanently deleted.

4. Violations of this Society Policy shall be reported to the Executive Director of ASME or his/her designee, so that ASME may take action to protect the confidential and proprietary nature of its member data.
5. Recipients of this data by virtue of their signed agreement with this Policy and Society Policy P-15.8, "Conflicts of Interest," assume full responsibility for adherence to these Society Policies.

C. Corrections to the Membership Database.

All additions, deletions, and corrections to the membership database identified by the leaders of ASME units, or their designees, should be documented and forwarded to:

ASME  
Membership Development Department  
Three Park Avenue  
New York, NY 10016-5990

Appropriate authorization for any change must include the date, the member's name, current office, and his or her signature.

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**ASME Member Data User Agreement**

I request access to member data for the \_\_\_\_\_  
district / section / subsection / group / technical division / technical group /  
institute /technical chapter of ASME.

I understand that the data contains confidential and proprietary information  
about members of ASME.

I have read and agree to adhere to Society Policy P-12.14, "Use of Member  
Data," and its limitations on the use of this data.

I have also read and agree to adhere to Society Policy P-15.8, "Conflicts of  
Interest," in regard to my use of this data.

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Signature \_\_\_\_\_ ASME Unit \_\_\_\_\_

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Name (Please Print) \_\_\_\_\_ Date \_\_\_\_\_

Mail or FAX to:  
ASME Managing Director, Knowledge and Community  
Three Park Avenue  
New York, NY 10016-5990  
FAX: 212-591-7671

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Responsibility: Knowledge and Community Board of Directors  
Reassigned from Council on Member Affairs 6/12/05  
Reassigned from the Committee on Planning and Organization  
6/11/97

Adopted: September 14, 1989

Revised: (editorial changes 8/93)  
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June 12, 2005