

Cycling UK’s Member Group Data Management Guidelines

Introduction

As you probably know, with the [GDPR regulations](https://stage.cyclinguk.org/Support%20for%20cycling%20groups%20and%20clubs/gdpr-groups), there are now no member email or address details going to Member Groups on a monthly basis. We have now, therefore, devised a new way for groups to communicate with members in their area to replace these monthly lists and to also keep track of who is riding and volunteering with the group.

Cycling UK’s Group Data Management Toolkit will allow groups to continue to access the details of current members that are in their postcode areas in order to:

* check the membership status of a particular rider
* send out welcome emails to new members
* send emails to all members in their area
* send mailings by post such as local newsletters and runs lists

The toolkit will also allow groups to manage lists of active members and riders. Initially, only the functions above will be available, but more features will be developed and added, in conjunction with Member Groups, in the future. These will include:

* recording lists of active riders
* managing local subscriptions (emails/newsletters etc)
* adding additional rider details
* logging details of rides and events
* adding riders to sub-groups such as Wednesday Coffee Pots, Sunday Riders etc
* sending emails to local riders

How will this data be accessed?

The data will only be available via your group’s [Publicity Page](https://stage.cyclinguk.org/local-groups) on our website.

The group’s current Registration Officer should be given the role of Registration Officer for the page and, once logged in, will be able to access and manage local members’ records as above in line with our Data Protection Policy.

The data will be searchable by membership number, email or surname and will show each member’s name, membership number, renewal date, and membership type.

The Registration Officer has already been sent a CSV spreadsheet of data for use at your AGM and this also shows voting rights. In time, they will be able to download this data themselves.

Somebody from within the group should also be appointed to the website role of Communications Officer (this may be the same person as the group’s current Publicity Officer) and this person will be able to send out communications such as newsletters, AGM notices and welcome letters to members on behalf of the group.

They will also be able in time to download a list of members’ names and addresses for postal mailings, after agreeing to delete this list once used.

Data Collected Locally

In addition to the data obtained from National Office, your group may also collect, process and store data locally. There will be two main ways of doing this:

1. Using the new online Cycling UK Group Data Management Toolkit
2. Using local group databases

This is how we envisage the two systems working.

1. **Using the Cycling UK Group Data Management Toolkit**

**Phase 1 (available autumn 2018)**

Access to Members’ Data via Cycling UK’s website

This data will be refreshed weekly and will show current Cycling UK members, recently lapsed members (with a two-month grace period) and those that have been marked as active with a particular group.

Groups or individual riders themselves can update this data with the following details:

* whether or not the rider is an active rider with the group;
* whether or not they are a newsletter subscriber;
* In Case of Emergency contact details (name and mobile number);
* riders’ own mobile numbers;
* photo consent;
* parental consent; and so on

Communications by Email

* an email template
* the ability to filter the list by active and subscriber flags
* the ability to opt in and out of communications
* the ability for Cycling UK staff to process returned/invalid emails

# **Phase 2**

The following data functions should be available early next year. The ability to:

* add additional riders who are not current members of Cycling UK;
* create subgroups/informal groups and link riders to them;
* save documents against a member’s record;
* assign roles to specific people eg ride leader, event organiser etc;
* allow non-members  to subscribe to group communications;
* reporting for groups on open/click through rates;
* sign-up for non-members
* record participation in any particular ride or event

Communications by Post

* flag for postal subscriptions and magazine subscriber (with end date)
* downloadable list of names and addresses via CSV file
* log of data downloaded and by whom for GDPR purposes
* user informed to delete file after posting
* user confirms list deletion via simple form

1. **Using Local Group Databases**

Local data can still be collected and stored locally with appropriate consent/legal reason; this data can be collected either directly at rides and events or via local subscription lists such as Googlemail or Mailchimp.

The welcome emails sent using the Cycling UK Group Data Management Toolkit can be used to ask new members to subscribe to these locally-held subscription lists via a link embedded in the welcome letter.

Locally held lists can only be updated by direct contact with members on it, rather than centrally.

Data locally collected and stored will be subject to the following conditions:

* Groups can still hold details of active riders or people who have signed up to a mailing list locally. An active rider must have ridden with your group in the previous Cycling UK financial year (October to September). Inactive riders must be deleted or made anonymous after one year of inactivity, unless there is a legal reason to keep the data.
* All email recipients must have the ability to unsubscribe to regular emails and the unsubscribe preference must be enacted as soon as possible.
* Locally collected data can be held in the following ways (in order of preference):
* Cloud Services like MailChimp or a properly maintained group website with users using individual accounts with high security password(s);
* Cloud spreadsheets like Google docs, with access limited to committee members only;
* Encrypted databases held on local computers;
* Password protected spreadsheets held on local computers or cloud storage;
* Paper based system held in a secured location such as a locked cupboard.
* People should only have access to the data they require, for example:
  + Newsletter editor – subscribers' email and name only;
  + Rider leaders/event organisers – name, membership number, mobile and ICE details only;
  + Committee Members – name and membership number only;
  + Registration Officer – name, membership number, current member status, ride activity etc
* Groups that use cloud-based subscription services can continue to send bulk emails using, for example:
  + Mailchimp /ymlp.com etc
  + Google / Yahoo groups
* If your group currently uses BCC (Blind Carbon Copy) to send out bulk emails, unfortunately this will need to stop by 1 October 2019, which is the start of our next financial year. Therefore, groups currently using BCC should either migrate their lists to the new Cycling UK Toolkit or move to one of the other options listed above (ie Mailchimp/Google/Yahoo).

The reason for this is that though BCC stops sharing email addresses between recipients, email addresses are still vulnerable if an account is hacked or if the sender’s own PC is compromised.

* It is OK to continue using standard email for internal emails within the group committee/volunteers' structure, though the use of distribution groups is encouraged.
* For groups with fewer than 15 members are encouraged to use the above systems but are not required to do so. Any data held or used by them **must have** been supplied locally by users themselves.