

Canadian Evaluation Society Membership Database Policy

February 2002

Section 1. Definition

The Canadian Evaluation Society (CES) membership database consists of information compiled from membership application and renewal forms. The active database contains information on current members as well as past members who have not renewed their membership within six months of their renewal date. Information on past members over the six-month cut-off date is archived.

The membership database is in electronic format. The handling of the data will be in preparation to be fully compliant with Bill C6 – Personal Information Protection and Documents Act by 2004. Personal Information as described by Bill C6 is personal information that is collected, used or disclosed in the course of commercial activities. Personal information includes any factual or subjective information about an identifiable individual (age, name, home address or phone number, ID numbers, income, ethnic status, social status, etc.) An employee's name, title, business address or telephone number is not covered by the Act. An organization's collection, use or disclosure of personal information solely for journalistic, artistic, or literary purposes is not covered by the Act.

Section 2. Principles

2.1 Ownership

- 2.1.1 The CES Membership database and its derivatives or products are the sole property of the National Society.
- 2.1.2 If a member terminates membership in the Society, the data in the database remains the property of the CES.

2.2 Use

2.2.1 Internal (CES National, Chapters and Current Members)

- a. CES National and Chapters may use members' personal information contained in the database for the purpose of communicating with members regarding any CES activities or CES sponsored events. This includes items such as annual general meetings, the Canadian Journal of Program Evaluation, newsletters, professional development workshops, annual conferences and membership renewal notices.
- b. Active and archived database information may be made available for Society or Chapter research, for purposes deemed acceptable by Executive Council.
- c. Current CES members and Chapters may obtain an electronic copy of the membership list but may not use this information to promote commercial ventures.
- d. No fees will be charged for providing CES database information for internal use.

2.2.2 External (Non-CES Users and Commercial Use by Current Members)

- a. All requests for external use will be made in writing to CES National Office, and must include such information as is required by National Office.

- b. CES National Office may approve requests for the external use of the database subject to the provisions of this database policy and any other direction received from the National Council or Executive Council.
- c. Approval of requests for external use of the database will be at the discretion of the CES National Office, and must be consistent with purposes approved by Executive Council.
- d. Only member names and postal addresses from the active database will be released for approved external uses.
- e. All requests for membership personal information that crosses international borders must have the express consent of the CES member (e.g., check box on application form).
- f. A fee will be charged for all external use of the database. At a minimum, the fee will cover the cost of providing the information.

2.3 Monitoring

Electronic database derivatives or products that are released for external use will contain “dummy tags” for the purpose of monitoring compliance with the stated, limited and “one-time” use of the product.

- a. CES National Office will monitor for misuse of database information by both internal and external users, and will so advise users.
- b. Database users who do not comply with database policies will be subject to penalties.

2.4 Member Rights

- a. Members may obtain or amend their personal information on the membership database at any time by contacting the National Office of CES in writing or by e-mail.
- b. Members have the choice on their application/renewal form or at any other time during the year as to the distribution of their personal information. No selection will be interpreted as no distribution.

Section 3. Sanctions

- 3.1 CES members who knowingly do not comply with the CES policies on use of the database may have their CES membership revoked indefinitely by Executive Council.
- 3.2 Both CES members and non-members who knowingly do not comply with the CES policies regarding the use of membership information will may be subject to criminal prosecution or civil action.
- 3.3 Where the offence in 3.1 or 3.2 relates to payment of fees and the National Office is able to resolve the issue, no further action will be taken. Where it cannot be resolved to the satisfaction of the National Office, a minimum action will be denial of future access to database information.

Section 4. Administration

4.1 Procedures Required for External Access to the Database

External users must apply to CES National Office, in writing or by e-mail, with a complete description of the use and purpose of the information to be obtained from the database. If the purpose is unclear, as determined by the National Office, further clarification and restatement of use and purpose is to be obtained before permission to use the database is granted. If the use is still deemed to be unusual or does not conform to the purposes identified in Section 2, the National Office may request the Chair, Administration Committee to make a decision. This decision will be recorded in the following Minutes of Executive, National Council.

Before database information is obtained and/or released, the signature of a legal representative of the requesting agency or firm will be required attesting to and agreeing with the following in writing (by fax or mail).

- a. The completeness and accuracy of the stated use of the information.
- b. To neither sell, trade nor exchange the information in either its original or a modified form before or after delivery.
- c. The information will not be used for purposes other than those declared.
- d. The information will be securely stored and access will be limited to the declared purpose.
- e. The permission for use of the information will not extend beyond one year of receipt.
- f. That CES does not guarantee the information.
- g. That permission is being granted for a “one-time” use of the derivative or product.
- h. The agreement above is legally binding and subject to Canadian civil and criminal law.

4.2 Invoicing

Normally, an invoice will accompany the delivery of a database product. Unique products, unusual requests or new users may be required to pay fees or a deposit before delivery of the product.

4.3 Fees

The initial fee schedule for three classes of users is described in a, b, and c below. Normal requests from users will be billed at these rates. Exceptional requests will be handled as indicated in item d.

The fee schedule may be changed at the suggestion of the National Office in consultation with the Chair, Administration Committee and subject to changes in costs. A vote will be taken by Council and the decision will be recorded in the following Minutes, National Council.

- a. Publishers of Professional Literature (Non-CES) – \$0.20 per name.
- b. Commercial Users (Non-CES) (e.g., promoting a workshop or conference, advertising a job opportunity) - \$0.50 per name.
- c. Member Commercial Uses (e.g., promoting a program or seminar, promoting company services, advertising a job opportunity) - \$0.20 per name.
- d. Exceptional Requests. Where the cost of providing database information exceeds the above fee schedule, the National Office will charge the actual cost plus ten percent.

Note: (1) There is no fee for internal use of the database (2.2.1 d).
(2) There is no fee for reciprocal promotion of CES National and Chapter events.

Section 5. Chapters

The statements included in Section 1 through Section 5 of this Policy Statement constitute the stated policy of the Canadian Evaluation Society (CES). Chapters may, at their discretion, promote “external” events in their newsletters or other normal communications to members, but must charge and remit to National Office the normal fee for that class of external user (i.e., \$0.20 or \$0.50 per name).