



# & Democrats Abroad: A Workbook

BY THE GLOBAL IT HELPDESK TEAM  
2020

# This Workbook

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This workbook is for:

- ✓ Leaders
- ✓ Database Admins
- ✓ Website bloggers
- ✓ SuperVolunteers

You will find the information that you need to pass the GDPR quiz, and to assist you in your future work as a volunteer at Democrats Abroad.

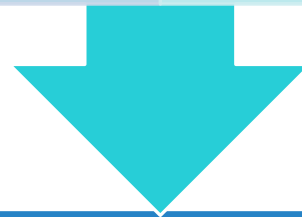


# What is GDPR?

## The General Data Protection Regulation:

Is a set of data protection laws in Europe.

applies to ALL residents of the European Union, and not only EU citizens.



## **GDPR applies to ALL members of Democrats Abroad.**

Individuals *own* their “Personal Data” - names, addresses, email addresses, etc., and have the right to control use of this data.

# What is GDPR? Some Definitions



**Data Protection Officer (“DPO”):** Our DPO is a lawyer who helps develop and maintain our data protection strategy and how we put this strategy into practice to ensure compliance with GDPR.

**Compliance:** Compliance means that we are meeting the requirements of the GDPR.

**Data Breaches:** When someone unauthorized obtains access to some or all of our membership information.

This includes:

- having your email or Facebook accounts hacked,
- losing your laptop or phone

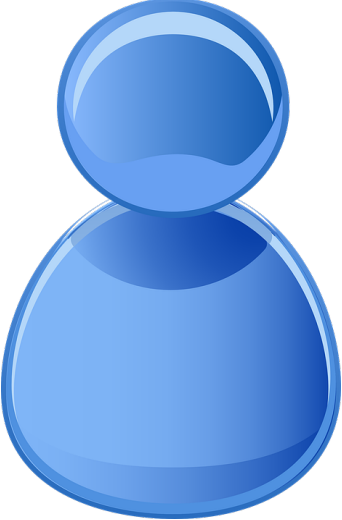
***These can all lead to data breaches for DA.***

**Personal Data:** this is the information that we gather and keep about our members.



# Personal Data is made up of...

## 1. Identifying Information



Phone Numbers

Location Data


IP Address

Email Accounts

Economic Data

ID Numbers

## 2. And Sensitive Data



Race

Sexual Orientation

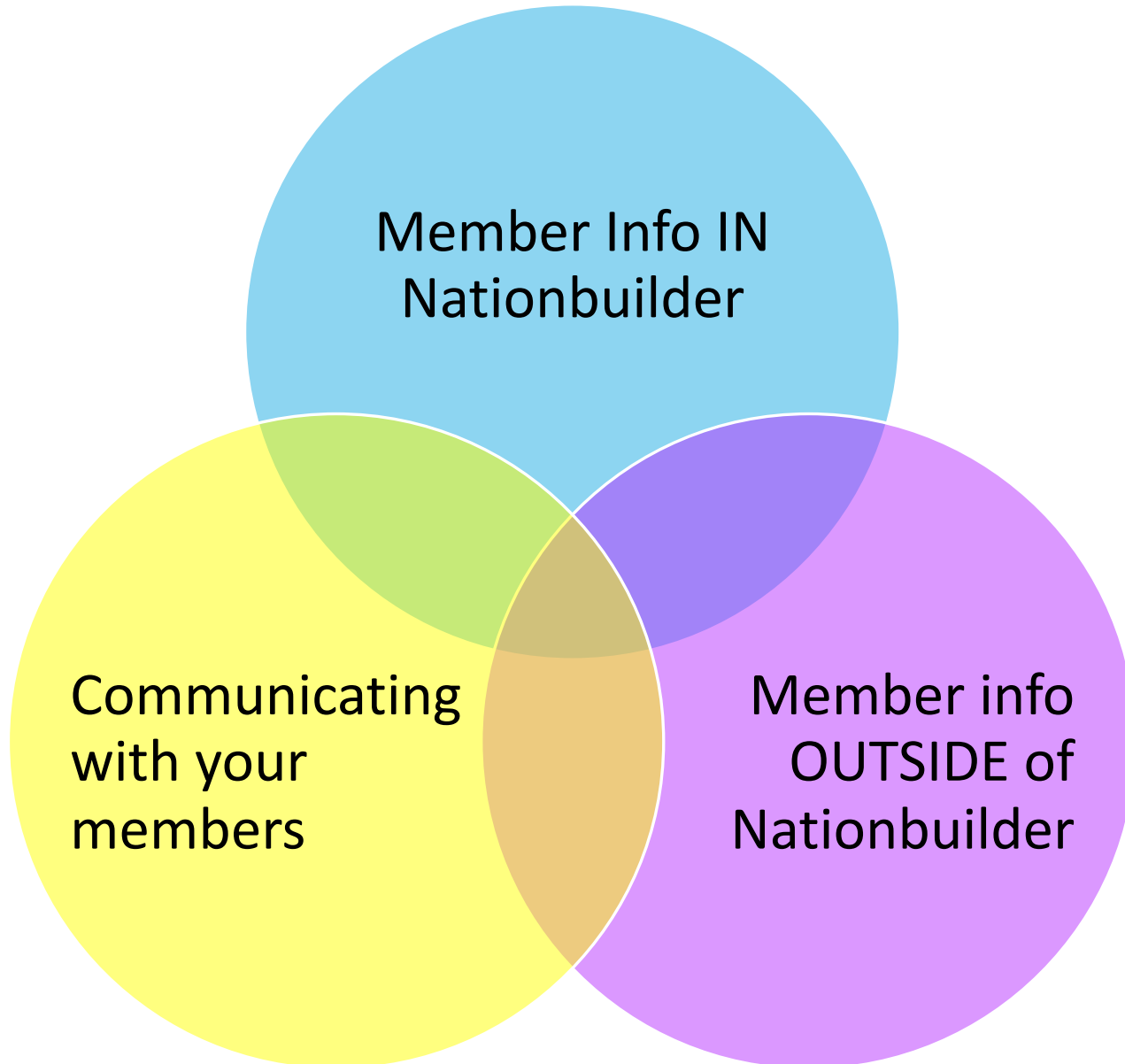
Religion

Politics

Union Info

Ethnicity











## 3 Major Themes for DA



What does this mean for DA Admins?

# Member Data: What is it?

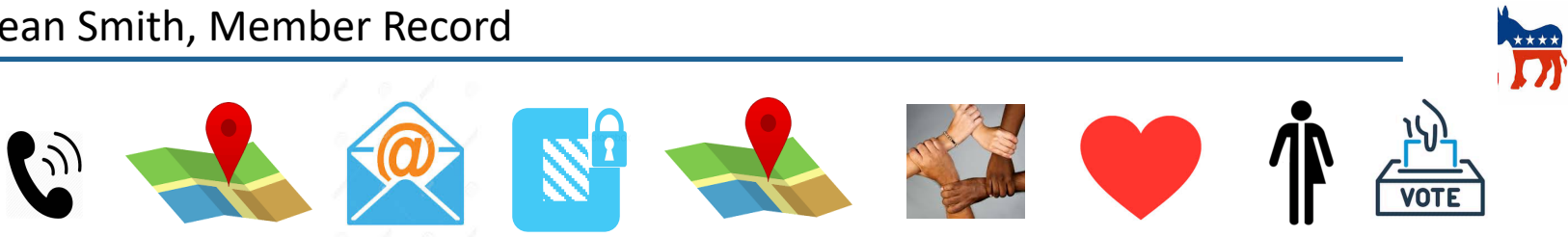
## Member Data Definition:

- All information that we ask our members to share with us
- This includes:
  - Member Names
  - Email addresses 
  - Local Street Addresses 
  - Registered Voting Addresses 
  - Phone Numbers 
  - Special Interests (Caucuses)   
  - Age and Date of Birth 
  - Voting History 
  - Membership in DA 

**All Member Data is subject to GDPR.**

Jean Smith, Member Record

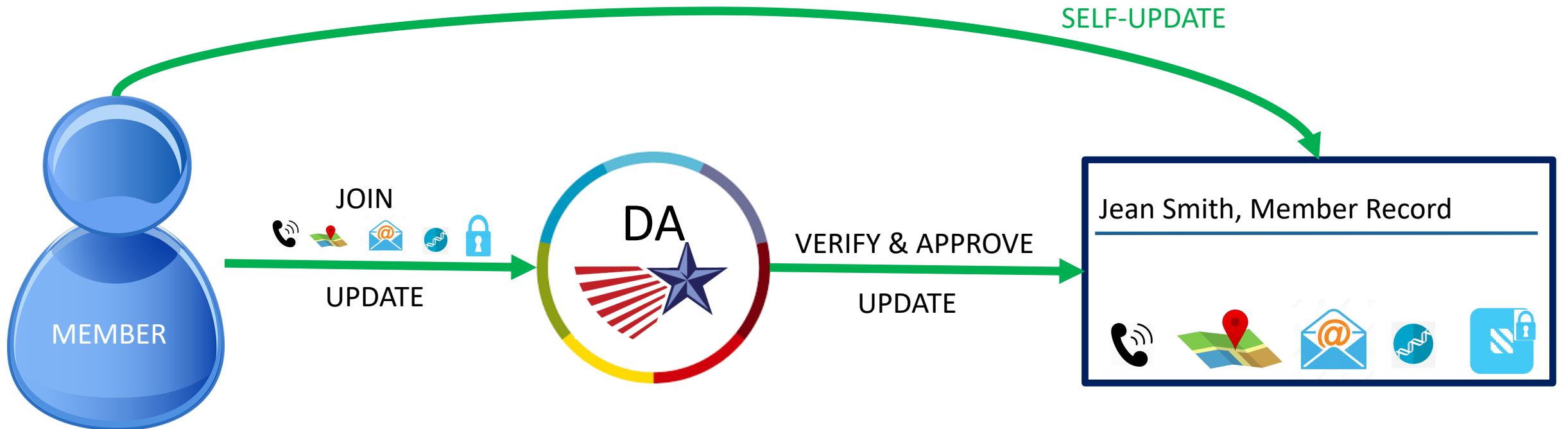
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# Member Data in Nationbuilder

## DATA THAT CAN BE ADDED TO A MEMBER RECORD

- All Member Information must come FROM the member themselves.
- You can use (a) phone calls, (b) emailing and (c) face to face contact to get updated information.
- You may correct misspellings and typos that are in the record.

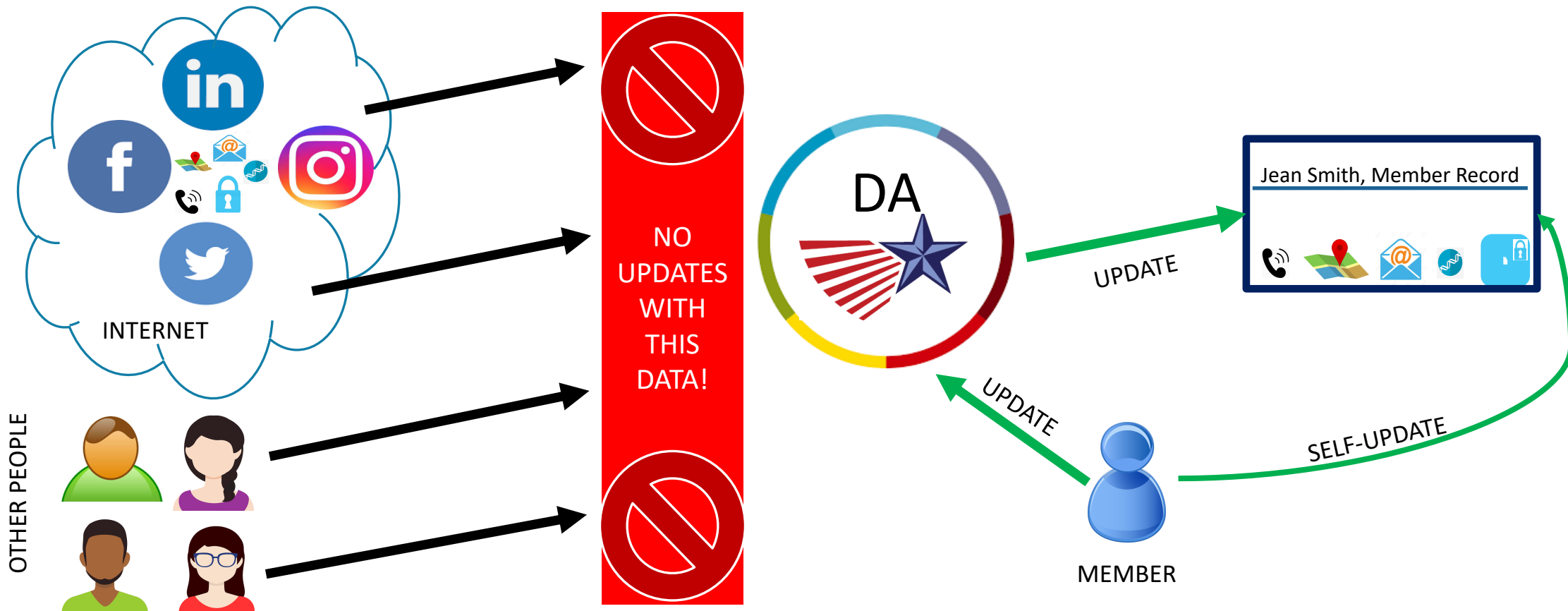




# Member Data in Nationbuilder:

## DATA THAT **CANNOT** BE ADDED TO A MEMBER RECORD

- NO information from Facebook, Linked In or any internet search can be added to a member's record.
- NO information from a 3rd Party (your friend, your mother, the Member's mother...) can be added to a member's record.



# Member Data in Nationbuilder:

## TARGETED CONTACTING:

### DATA THAT CANNOT BE USED

- Any Social Media info in the member record.
- Including:
  - Twitter name
  - Facebook name
  - Linked In info



### DATA THAT CAN BE USED:

- Voting State/City/District
- Location
- Age
- Caucus Interests

You can filter for all of this information in Nationbuilder.

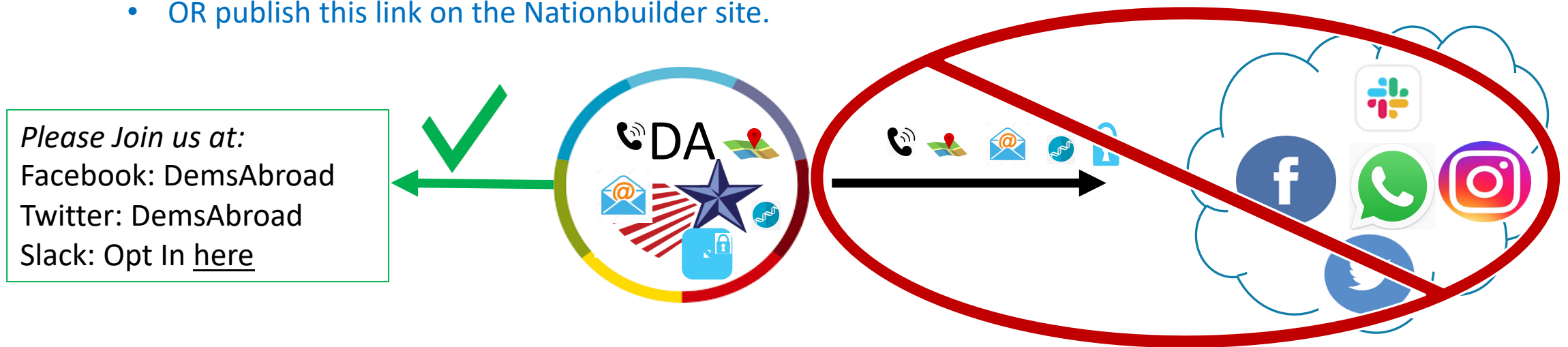
# Member Data in Nationbuilder:

**NEVER** import member emails or phone numbers into communications platforms outside of Nationbuilder. **This includes:**

- WhatsApp
- Any Facebook Group
- Google or Yahoo Groups
- Slack (even for DA)

**You CAN INVITE your members to join an outside platform by:**

- **inviting them to use an opt-in link**
  - Send this in an email blast from NB
  - OR publish this link on the Nationbuilder site.



Please make sure you are not using Social Media platforms as your primary method of communication with your members!

# Social Media – What is it for?

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**Facebook, Twitter, Instagram and other Social Media are “free” Advertising and Marketing platforms.**

- Please DO use them to publicize your countries, chapters, caucuses and special interest groups.
- Publish your meetings and events too
- You can and should answer any questions that you receive *within* these platforms.
- Please remember to refer non-members to our site to join and become official DA members!
- And please remember check the official DA Comms guide!



# What Does This Mean For Me?

## Remember:

All data needs to come directly from the member, and any changes need to be approved by them.

## SAMPLE ISSUES:

You meet Thomas Paine, one of your chapter members, at an event. He tells you he's moving to a research station in Antarctica and will be there for 2 years. In your role as a database admin, what should you do?

- a) Ask him if you may update his DA information to reflect his upcoming move right there at the event.
- b) Tell your chapter chair to delete him.
- c) Don't ask him anything, just go home and update his data when you have time.

You notice on Facebook that Michelle Yeoh, one of your long-term members, has changed her location from Hong Kong to Cancun. What can you do?

- a) Change her address in the database to Cancun
- b) Write to Michelle from her record in the database and ask if she wants to update her location in the DA records.
- c) Double check on Linked in – if it matches, delete her
- d) Call her and ask if she would like to update her member record

# Answers

You meet Thomas Paine, one of your chapter members, at an event. He tells you he's moving to a research station in Antarctica and will be there for 2 years. In your role as a database admin, what should you do?

- a) Ask him if you may update his DA information to reflect his upcoming move right there at the event.  
✓ Get consent and data directly from the member
- b) Tell your chapter chair to delete him.  
X Do not delete members unless they request it
- c) Don't ask him anything, just go home and update his data when you have time.  
X Members must consent to change their data in our system

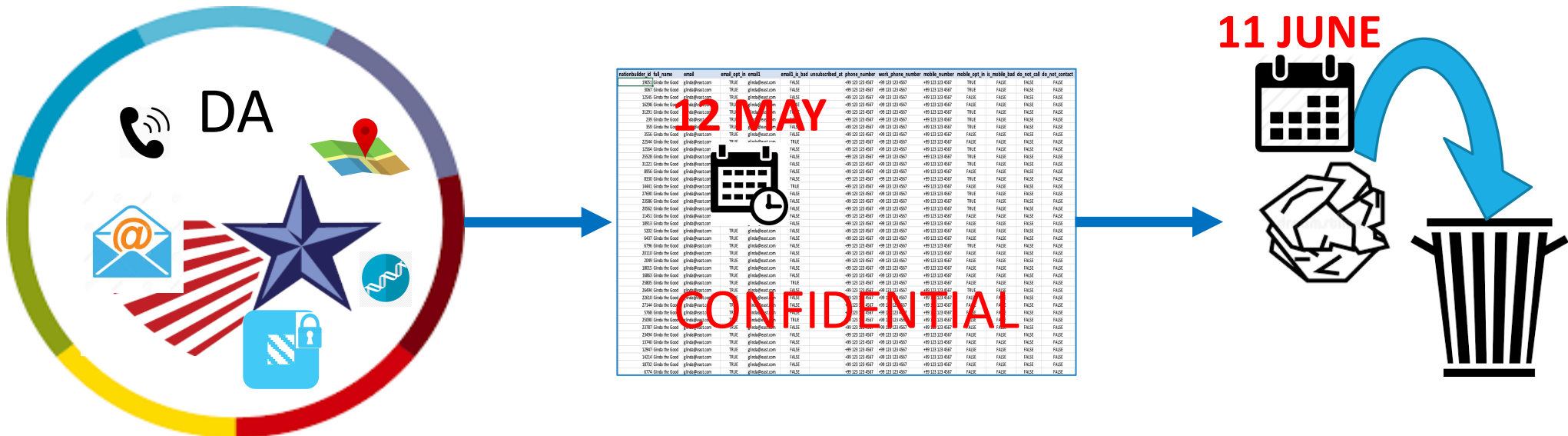
You notice on Facebook that Michelle Yeoh, one of your long-term members, has changed her location from Toronto to Cancun. What can you do?

- a) Change her address in the database to Cancun  
X Members must consent to change their data in our system
- b) Write to Michelle from her record in the database and ask if she wants to update her location in the DA records.  
✓ Get consent and data directly from the member using Nationbuilder  
Always send emails like this from the member record directly. This confirms and verifies the DA identity for the recipient of the email.
- c) Double check on Linked in – if it matches, delete her  
X Do not use social media to update records and don't delete members unless they request it
- d) Call her and ask if she would like to update her member record  
✓ Get consent and data directly from the member by calling  
Any member who has given us their phone number and has not opted out of calls can be called for DA purposes, either via CallHub or from your personal phone.

# Member Data Outside of Nationbuilder: Lists

## DATA THAT IS EXPORTED FROM NATIONBUILDER

- All Member Information exported from Nationbuilder into a list of any kind is still subject to GDPR.
- Anyone with access to member data of any kind outside of the Database must have signed a Confidentiality Agreement.
  - This CA can be filed at the global level or at the local country/chapter level.
- **These Lists must be deleted every 30 days.**
  - **Why:** Under GDPR, anyone who requests to have their information removed from our database *must* be deleted from ALL our systems within 30 days. (“Right to be Forgotten”)





# Member Data Outside of Nationbuilder: Lists

## How to use your lists

DO	DON'T
Share your lists with your team	Share your list with anyone who has not signed and submitted a Confidentiality Agreement
Use lists to call members	Use lists to email members from accounts outside of Nationbuilder
Ask your volunteer team for permission to email them from a private email address.	Just start emailing the volunteers from your personal email address
Use member lists as a reference for meetings and events	Use lists to add members to Whatsapp, Slack, or a Facebook group.
Make sure you shred your printed lists when you are done with them	Add member data to the list without adding the information to the database



# What Does This Mean For Me?

Remember:  
the 30 day rule ensures that DA complies with our members' right to be forgotten.

## SAMPLE ISSUES:

You have accumulated a stack of paper member applications from local events. They have all been added to the database by your team. What do you do with them?

- a) Keep them in a folder for future reference
- b) Throw them in the rubbish
- c) Shred them

You have been adding notes and corrections to your membership list in Excel, but not to the database. You realize your list is 29 days old. What can you do to save the information?

- a) You know you didn't delete anyone, so keep working on the list
- b) Ask for a new list ASAP;  
Run a comparison to find any deletions;  
Remove anyone from your old list who is not on the new list;  
Enter the changes into the database as soon as you can.
- c) This doesn't apply to me, we are not in a GDPR Country

# Answers

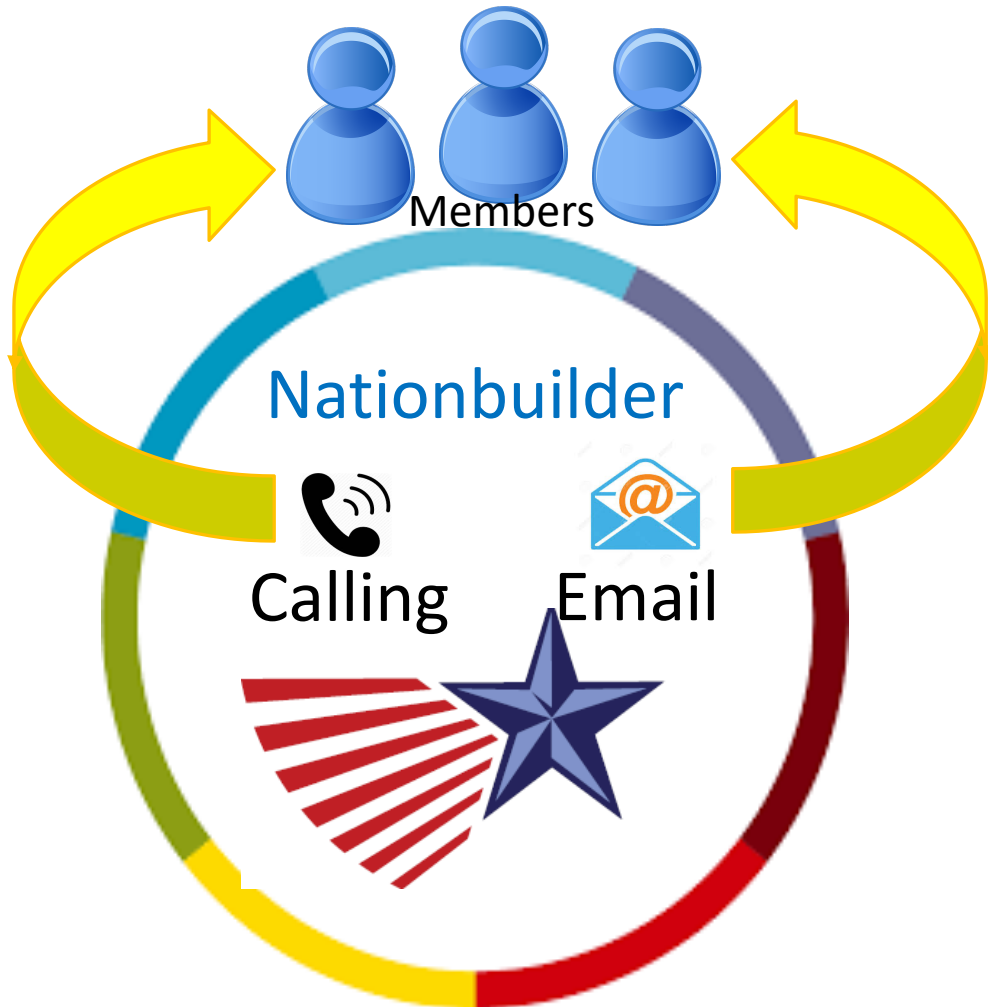
You have accumulated a stack of paper member applications from local events. They have all been added to the database by your team. What do you do with them?

- a) Keep them in a folder for future reference
  - X This is a violation of our members right to be forgotten
- b) Throw them in the rubbish
  - X This information is private and confidential, do not throw entire forms away – please cut them up or shred them
- c) Shred them
  - ✓ Please shred or cut up all forms so the information on them cannot be reconstructed and reused.

You have been adding notes to your membership list, but not to the database. You realize your list is 29 days old. What can you do to save the information?

- a) You know you didn't delete anyone, so keep working on the list
  - X Members may have updated themselves and moved or have been deleted by a Global Admin
- b) Ask for a new list ASAP; Run a comparison to find any deletions; Remove anyone from your old list who is not on the new list; Enter the changes into the database as soon as you can.
  - ✓ Yes please, and delete the old list as soon as you are done!
- c) This doesn't apply to me, we are not in a GDPR Country
  - X All countries and chapters in DA are subject to GDPR.

# Communications with Members



# Communications: Calling



You can:

1. Call any member who has not opted out of being called.
2. Text any member who has opted in for texting.



The screenshot shows a contact form with the following elements:

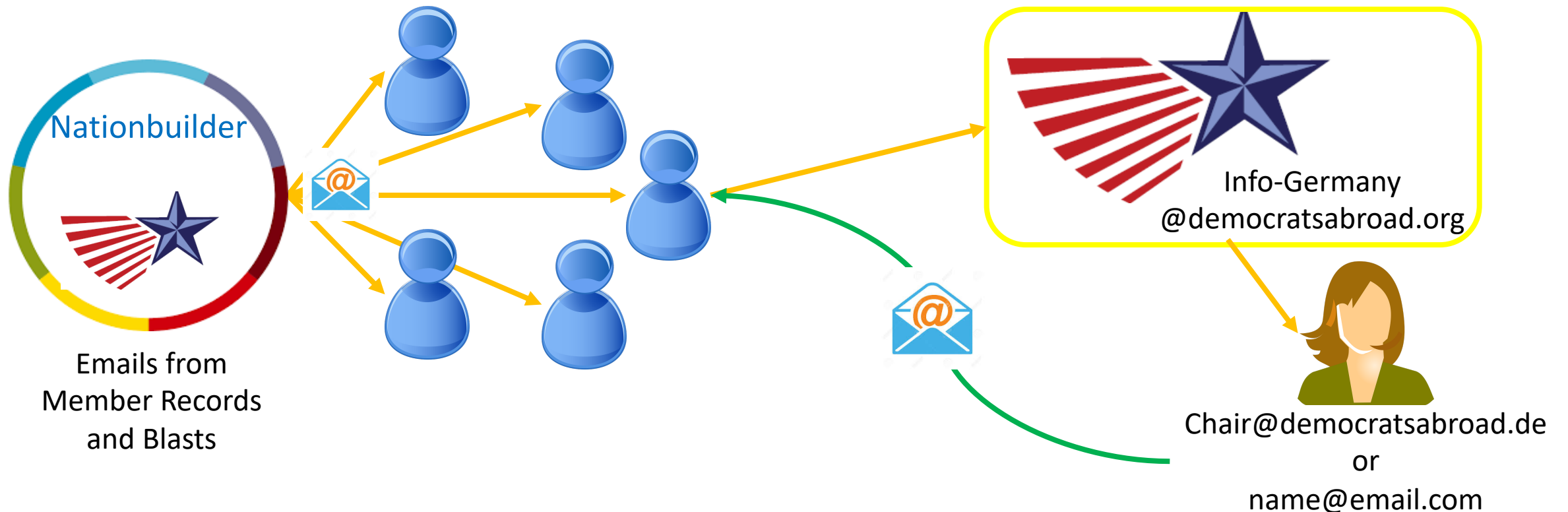
- Receive emails
- Do not call
- Do not contact, period
- Email:
- Bad email address
- [+ Add additional email](#)
- Mobile number:
- Receive text messages
- Bad mobile number
- Home phone:

Two yellow circles with numbers 1 and 2 are on the right. Blue arrows point from circle 1 to the "Do not call" checkbox and from circle 2 to the "Receive text messages" checkbox.

# Communications: Emailing

## MEMBER EMAIL ADDRESSES ARE CONFIDENTIAL

- Always email the members from their records or from the Broadcaster.
- Always ask your members to email the **official** DA email associated with your chapter or caucus.
- You may **REPLY** from your personal email address or your CC's official DA email (if there is one).



# Communications: Emailing

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Always send **UNSOLICITED** emails from the database so that:

- Your email is branded
- Member can easily identify the email source

We define “Unsolicited” emails as emails that are initiated from DA.

- Email Blasts (Newsletters, Voter Alerts)
- Individual Emails to Members (Welcome, Verification & Update Questions<sup>+</sup>)

<sup>+</sup>*Exception: The member is a close friend or relative – ONLY then can you email them from your private email address.*

**Reply** to Member questions that are sent to you or the info-\* address from:

- your personal email account\*
- Your official DA CC email account (ex: “\_\_\_@democratsabroad.fr”)

*\*we recommend NOT using your private email account for DA work – use a separate one so you can easily delete confidential member information. Ex: “DACChairAtlantis@Gmail.com”*

# Communications: Social Media

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## Social Media Communications with your Members



❖ You can POST News and Events in Facebook with links to the DA Website.

❖ You can ANSWER any questions on Facebook or Facebook Messenger.

**NEVER add information that you see in a Facebook profile to Nationbuilder**



❖ You can POST an OPT-IN link to Slack in an Email Blast or on the Website for your Members.

❖ You may freely communicate with your members WITHIN Slack.

**NEVER add your members email address to Slack in order to invite them all.**

**DO NOT use Slack as your primary method of communication with Members.**



❖ You can POST News and Events on Twitter or Instagram with links to the DA Website.

❖ You can ANSWER any Tweets or Comments on Twitter or Instagram.



❖ You can follow or subscribe to anyone who follows or subscribes to your feed.

**NEVER add a Twitter or Instagram name to the database.**

**Never copy a Twitter handle from the database to your DA Twitter account.**

# Communications: Text Messaging

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## Text Message Options:

1. **CallHub** offers a group texting service that you can set up with the DA account. The Wiki information is [HERE](#).
2. **Texting from your own Phone - regular SMS.**

## What about WhatsApp??

WhatsApp actively collects and sells metadata about its users. Location, Groups, Demographics, and amount of activity are just some of this data.

By using WhatsApp for DA, you would be giving away information such as the locations and political stances of American men between the ages of 60-70, or the phone numbers of the 35 Democrats Abroad members in the city of Juarez, Mexico. The installation of WhatsApp on a company phone is also banned in some European countries.

**Please don't give away our member information by using this App for DA purposes. It is not GDPR Compliant.**



# What Does This Mean For Me?

## Remember:

Unsolicited Emails should be sent from the Database, and Social Media communications should stay within the platform.

## SAMPLE ISSUES:

You asked for a member list export, and you can see on this list that 12 people vote in Arizona. You want to inform them about the ERA vote. What do you do?

- a) Create a filter in NB for these voters and email them using the Broadcaster
- b) Copy their email addresses into the BCC field in your email program and send them a note from your personal email account.

You get a message on Facebook Messenger from Idris Elba, who says he and Ricky Martin want to attend your chapter meeting, but it is at a member's private home and he doesn't see the option to RSVP on Facebook. What do you do?

- a) Email the Helpdesk and ask if you can send him the address
- b) Reply with the link to the event on the DA Website and ask him to RSVP there
- c) Offer to pick them up and drive them there
- d) Add them both to the database immediately

## Answers:

You asked for a member list export, and you can see on this list that 12 people vote in Arizona. You want to inform them about the ERA vote. What do you do?

- a) Create a filter in NB for these voters and email them using the Broadcaster  
✓ This is the correct way to send an unsolicited email to these voters
- b) Copy their email addresses into the BCC field in your email program and send them a note from your personal email account.  
X Always send unsolicited emails from the database

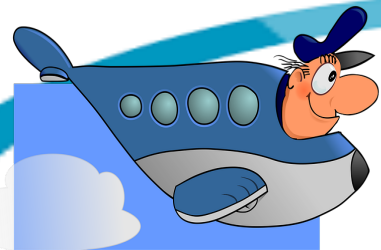
You get a message on Facebook Messenger from Idris Elba, who says he and Ricky Martin want to attend your chapter meeting, but it is at a member's private home and he doesn't see the option to RSVP on Facebook. What do you do?

- a) Email the Helpdesk and ask if you can send him the address  
X You should never send a private address via FB Messenger to an unknown party, even if he claims to be Idris. But Helpdesk might show up at the event if he and Ricky are attending...
- b) Reply with the link to the event on the DA Website and ask him to RSVP there  
✓ This will allow you to add him to the RSVPs and encourage him to join.
- c) Offer to pick them up and drive them there  
X Nice, but not correct.
- d) Add them both to the database immediately  
X No, definitely not.

Member Info IN  
Nationbuilder

Communicating  
with your  
members

Member info  
OUTSIDE of  
Nationbuilder



Here are some  
real-life DA  
GDPR  
problems.

The answers  
are at the end  
of the  
workbook.

1. Jimmy Smits is the Volunteer Coordinator for Denmark. He has no signed Confidentiality Agreement and has none of the certifications to access the database. How can he reach out to volunteers?

- a) The Sweden chair, Martina Navratilova, gives him a list of members who have said they want to volunteer so that Jimmy can email them all from his personal email account.
- b) Jimmy signs a CA and gives it to Martina so he can get a copy of the Membership List and call all the volunteers who are callable.
- c) Martina emails all of the Danish membership, asking them to fill out a Google Form if they wish to volunteer. On the form she specifies that Jimmy will be in touch with everyone who signs up by emailing them from his personal email address.
- d) Martina emails all the volunteers using the Broadcaster and tells them that Jimmy will be in touch from his personal account.
- e) Martina emails all the volunteers from the Broadcaster and asks them to reply to her if they are still interested. She then passes this list on to Jimmy.
- f) A and B
- g) B and C

Key points in this problem:

- Unsolicited emails must be sent from Nationbuilder
- Volunteers must Opt-in to being contacted outside of the database
- Nobody should have access to Membership information unless they have signed and filed a Confidentiality Agreement.

2. Your friend, Paris member Madeline Albright, is moving from Paris to Sydney. You tell the Chair of France, Mehmet Oz, when you see him at the Global Meeting in Toronto. Mehmet and Maddie have met, but only socialize with each other at DA Events. What can Mehmet do?

- a) Mehmet can email Maddie from his personal email account, cardio@gmail.com, and ask her for her new address information.
- b) Mehmet can email Maddie from his chair@democratsabroad.fr.
- c) Mehmet can update Maddie's address information based on information he gets from you.
- d) Mehmet can email Maddie from her record in Nationbuilder and ask her why she moved without telling him
- e) Mehmet can email Maddie from her record in Nationbuilder and ask her if there's any updated address information that she would like DA to have.

Key points in this problem:

- Unsolicited emails must be sent from Nationbuilder
- All personal information must come directly from the member
- Respect our members' privacy and use neutral language when you write to them

3. Viola Davis has a number of non-members who want to attend meetings and receive the newsletter for her local chapter. They aren't American, so they can't be members. How can she keep them informed?

- a) This is irrelevant to GDPR
- b) She can copy all the member email addresses to her personal computer and email the newsletter from her laptop with everyone in BCC.
- c) She can forward the monthly newsletter from her inbox to all the non members.
- d) She can forward the monthly newsletter to all the non-members after removing the DA footer from the email.
- e) She can post the monthly newsletter as a news item on the DA Website

Key points in this problem:

- Unsolicited emails must be sent from Nationbuilder

4. Stanley Kwan has posted a Poetry Jam event for Wednesday. He needs to email all the RSVPers with the updated address for the event, but he is not an email Admin. What can he do?

- a) Email everyone who RSVP'd from his personal email address
- b) Ask the Helpdesk to send the new address to all the attendees
- c) Post the updated address of the jam in the event so that it appears on the map
- d) Ask the Helpdesk for an RSVP List and email everyone from his personal address
- e) Ask the Helpdesk for an RSVP List and call everyone who responded
- f) Ask his chapter chair, Monserrat Caballé, to email all the members who RSVP'd from Nationbuilder and email all the non-members from her personal email address

Key points in this problem:

- Unsolicited emails to members must be sent from Nationbuilder
- Non-Members are not emailable from Nationbuilder

5. You want to highlight the geographic spread of your caucus members and have one member per US region (Northeast, Southeast, Midwest, Southwest, and West) write a story about the reason they are Democrats. How can you do this?

- a) Pick 5 individuals based on their voting state. Put them on a list in the database, and send them an email blast to ask them to tell their stories.
- b) Send an email blast to your entire membership and ask for volunteers to tell their stories.
- c) Pick 5 states and email all the members who vote in those states to ask them to tell their stories.
- d) Pick 5 individuals that you have met in person and email them from their records to ask them to tell their stories.

Key points in this problem:

- Our members data is personal and private. They didn't register with DA so that they could tell their private stories in public. Our primary purpose is to help Democrats Abroad vote.

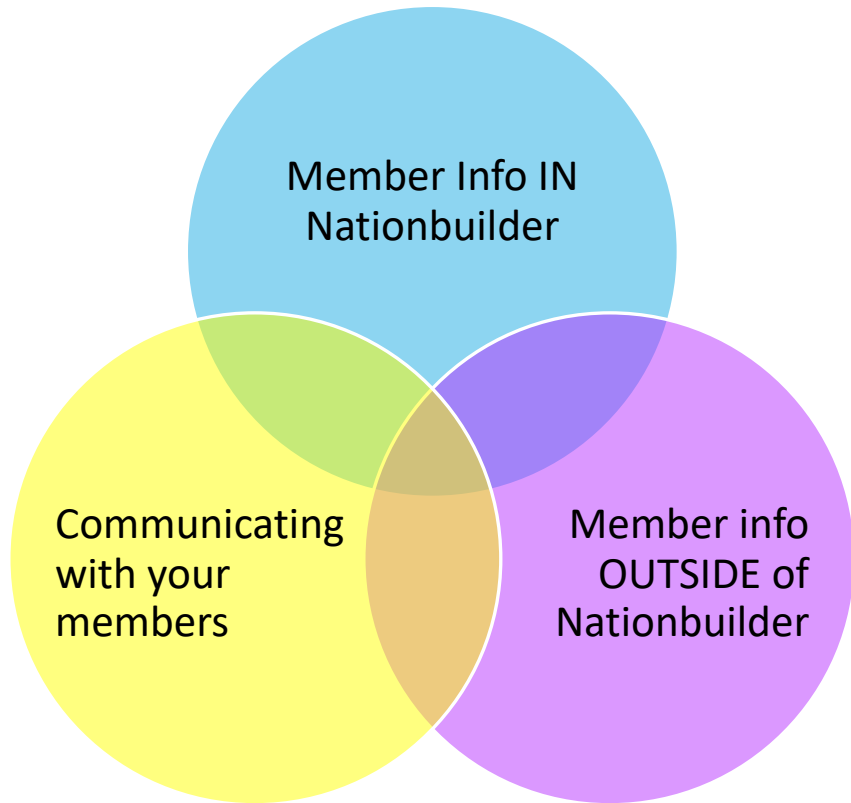


6. You're calling chapter members from a handwritten list that you have been compiling over the past months based on attendance at monthly meetings in order to verify their member information and update their Last Verified Date (LVD). You're writing down all the new information as you go and will update it in Nationbuilder next week. Is this what you should be doing and is it compliant with GDPR?

- a) Yes, it is fine because it's a list that you put together yourself, not from the database.
- b) Yes, because this is what you should be doing to verify your members.
- c) No, because part of the list is more than 30 days old
- d) Yes, because all the members signed the attendance sheet.

Key points in this problem:

- Any member list outside of the database that is older than 30 days must be disposed of.



Here are some  
real-life DA  
GDPR Answers.

1. Jimmy Smits is the Volunteer Coordinator for Denmark. He has no signed Confidentiality Agreement and has none of the certifications to access the database. How can he reach out to volunteers?

- ~~a) The Sweden chair, Martina Navratilova, gives him a list of members who have said they want to volunteer so that Jimmy can email them all from his personal email account.~~
- b) Jimmy signs a CA and gives it to Martina so he can get a copy of the Membership List and call all the volunteers who are callable.
- c) Martina emails all of the Danish membership, asking them to fill out a Google Form if they wish to volunteer. On the form she specifies that Jimmy will be in touch with everyone who signs up by emailing them from his personal email address.
- ~~d) Martina emails all the volunteers using the Broadcaster and tells them that Jimmy will be in touch from his personal account.~~
- ~~e) Martina emails all the volunteers from the Broadcaster and asks them to reply to her if they are still interested. She then passes this list on to Jimmy.~~
- ~~f) A and B~~
- g) B and C

Key points in this problem:

- Unsolicited emails must be sent from Nationbuilder (a) (d) (e)
- Volunteers must Opt-in to being contacted outside of the database (e)
- Nobody should have access to Membership information unless they have signed and filed a Confidentiality Agreement. (f)

2. Your friend, Paris member Madeline Albright, is moving from Paris to Sydney. You tell the Chair of France, Mehmet Oz, when you see him at the Global Meeting in Toronto. Mehmet and Maddie have met, but only socialize with each other at DA Events. What can John do?

- ~~a) Mehmet can email Maddie from his personal email account, moon@gmail.com, and ask her for her new address information.~~
- ~~b) Mehmet can email Maddie from his chair@democratsabroad.fr.~~
- ~~c) Mehmet can update Maddie's address information based on information he gets from you.~~
- ~~d) Mehmet can email Maddie from her record in Nationbuilder and ask her why she moved without telling him~~
- e) Mehmet can email Maddie from her record in Nationbuilder and ask her if there's any updated address information that she would like DA to have.

Key points in this problem:

- Unsolicited emails must be sent from Nationbuilder (a), (b)
- All personal information must come directly from the member (c)
- Respect our members' privacy and use neutral language when you write to them (d)

3. Viola Davis has a number of non-members who want to attend meetings and receive the newsletter for his local chapter. They aren't American, so they can't be members. How can she keep them informed?

- a) ~~This is irrelevant to GDPR~~ Only if Viola chooses the right method to email her members.
- b) ~~She can copy all the member email addresses to her personal computer and email the newsletter from her laptop with everyone in BCC.~~
- c) She can forward the monthly newsletter from her inbox to all the non members.
- d) She can forward the monthly newsletter to all the non-members after removing the DA footer from the email. This is actually a better option because this way nobody can unsubscribe Viola from DA.
- e) She can post the monthly newsletter as a news item on the DA Website

Key points in this problem:

- Unsolicited emails must be sent from Nationbuilder (a) (b)

4. Stanley Kwan has posted a Poetry Jam event for Wednesday. he needs to email all the RSVPers with the updated address for the event, but he is not an email Admin. What can he do?

- ~~a) Email everyone who RSVP'd from his personal email address~~
- ~~b) Ask the Helpdesk to send the new address to all the attendees~~
- c) Post the updated address of the jam in the event so that it appears on the map
- ~~d) Ask the Helpdesk for an RSVP List and email everyone from his personal address~~
- e) Ask the Helpdesk for an RSVP List and call everyone who responded - **only works if all RSVPS have phone numbers**
- f) Ask his chapter chair, Monserrat Caballé, to email all the members who RSVP'd from Nationbuilder and email all the non-members from her personal email address – **Stanley can also email the non-members himself.**

Key points in this problem:

- Unsolicited emails to members must be sent from Nationbuilder **(a) (b)**
- Non-Members are not emailable from Nationbuilder
- Helpdesk does not have the manpower to do RSVP emailings for you **(d)**

5. You want to highlight the geographic spread of your caucus members and have one member per US region (Northeast, Southeast, Midwest, Southwest, and West) write a story about the reason they are Democrats in their region. How can you do this?

- a) ~~Pick 5 individuals based on their voting state. Put them on a list in the database, and send them an email blast to ask them to tell their stories.~~
- b) Send an email blast to your entire membership and ask for volunteers to tell their stories.
- c) Pick 5 states and email all the members who vote in those states to ask them to tell their stories.
- d) ~~Pick 5 individuals that you have met in person and call them to ask them to tell their stories.~~

Key points in this problem:

- Our members data is personal and private. They didn't register with DA so that they could tell their private stories in public. Our primary purpose is to help Democrats Abroad vote.
- Even if you have met a member, unless they have volunteered to write their story already, it is a violation of their privacy for us to ask them specifically to publicize such specific information.

6. You're calling chapter members from a handwritten list that you have been compiling over the past months based on attendance at monthly meetings in order to verify their member information and update their Last Verified Date (LVD). You're writing down all the new information as you go and will update it in Nationbuilder next week. Is this what you should be doing and is it compliant with GDPR?

- ~~a) Yes, it is fine because it's a list that you put together yourself, not from the database.~~
- ~~b) Yes, because this is what you should be doing to verify your members.~~
- c) No, because part of the list is more than 30 days old
- ~~d) Yes, because all the members signed the attendance sheet.~~

Key points in this problem:

- Any member list outside of the database that is older than 30 days must be disposed of regardless of the origin of the list.
- Members who wish to be deleted often write directly to the global helpdesk or use the delete option in the unsubscribe section an email blast. As a local admin you will not see this data.

What *should* you be doing? See the next page for details.



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Answer: NO.

What *should* you be doing?

There are 2 issues here: the LVD, and the member update.

LVD:

1. You do NOT need to update the LVD if the members have RSVP'd on the Website.
2. LVD does not need to be updated manually every month – once a year is enough.
  - When you do this is up to you. If you have 2 meetings within a 30-day period, you can combine these lists and log the contact.



Member Updates:

1. You should check the emails and phone numbers against the member records within 30 days of your meeting and then tear up this list
2. The most important thing is to ensure that your members have valid email addresses and that we have complete registered voting address information for them so that we can keep them informed.