

**IEEE AND IEEE SA TOOLS FOR
STANDARDS COMMITTEE,
WORKING GROUP, AND
INDUSTRY CONNECTIONS ACTIVITY
DATA PRIVACY COMPLIANCE**



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IEEE DATA PRIVACY POLICIES AND TOOLS

CHANGES IN DATA PRIVACY

❑ **Change in perspective**

- ❑ Reduce the amount of personal data collected, and limit to what is needed
- ❑ Obtain consent for use of the data you collect and distribution to other parties
- ❑ Limit access to personal data to only those who need that access
- ❑ Reduce the possibility of unauthorized access to that data (remove, anonymize, or encrypt)
- ❑ Secure the data you collect
- ❑ Delete the data when possible

❑ **Change in actions**

- ❑ Change in the way you collect data, including the requirement to obtain consent
- ❑ Change in the tools you use, as the tools themselves will need to be compliant
- ❑ Change in communication, as the type of communication is determined by the person's interaction with IEEE
- ❑ Change in process of using personal data, as consent has to be mapped to use
- ❑ Change in responsiveness, as requests to “unsubscribe” will need to be honored promptly and any breach will need to be immediately reported

DATA PRIVACY POLICIES

Volunteer Dashboard

<http://sites.ieee.org/gdpr/>

Policies for IEEE Data Users

1. Privacy Policy (<https://www.ieee.org/security-privacy.html>)
2. Data Access and Use Policy (<https://www.ieee.org/ieee-data-access-and-use-policy.html>)
3. Events Terms and Conditions (<https://www.ieee.org/conferences/event-terms-and-conditions.html>)

Digital Guidelines

1. Cookie Collection (<http://sites.ieee.org/gdpr/digital-guidelines/cookie-compliance/>)
2. Social Media (<https://brand-experience.ieee.org/guidelines/digital/social-media/>)
3. Mobile Applications (<http://sites.ieee.org/gdpr/mobile-application-guidelines/>)
4. Contest Terms and Conditions (<http://sites.ieee.org/gdpr/social-media-compliance/>)

IEEE DATA PRIVACY TOOLS

IEEE has updated most of its tools to be compliant with IEEE Data Privacy Policies, so it is always better to use IEEE tools rather than third-party tools.

If you use third-party tools, there will be additional obligations for ensuring that the third party is compliant with data privacy regulations and your use of those tools is compliant with IEEE Data Privacy Policies, including the required collection of consent to the IEEE Privacy Policy where personal data is collected.

IEEE has four main tools to help capture and validate consent:

- IEEE Consent Management System (CMS) – *stores auditable consent*
- Privacy Portal – *provides a listing of the consent in the CMS that was provided by the user*
- List Validator – *validates emails against the CMS to check acceptance of the IEEE Privacy Policy*
- Bulk Consent Upload Tool – *permits upload of consents in a specific format (by staff only; contact ieeedata@ieee.org for assistance); a template is also available*

Visit sites.ieee.org/gdpr for additional information.

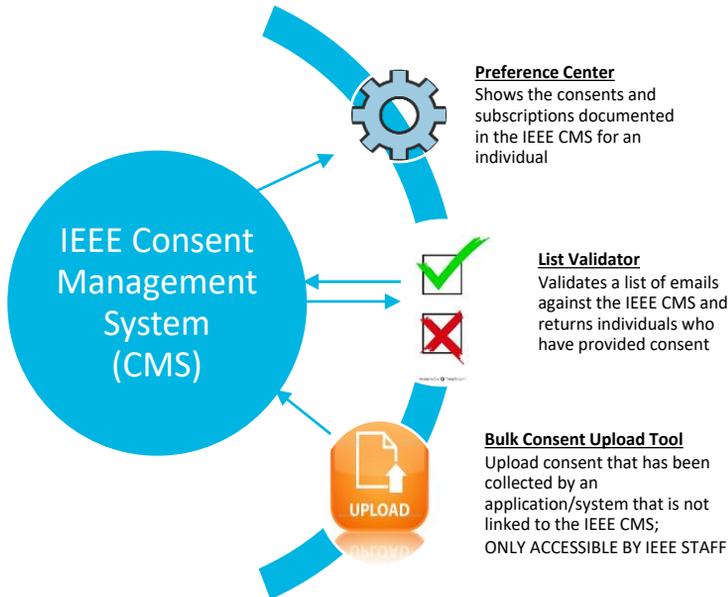
OVERVIEW

The IEEE Consent Management System (CMS) is the authoritative, auditable archive of consents provided to IEEE. There are three actions that can be taken:

Query against the CMS for an individual's consent record (Preference Center)

Upload a list of emails and validate against the CMS to determine who on the list have provided consent (List Validator)

Upload consent collected outside the CMS (Bulk Consent Upload Tool)



IEEE SA TOOLS

WORKING GROUP WEBSITE

WORDPRESS

- ❑ **IEEE SA provides template WordPress web sites for IEEE SA Working Groups. These sites are automatically programmed to comply with IEEE's Cookie Policy, and can have forms that automatically feed consent gathered on the site. Contact your Program Manager to obtain a guide to assist you in integrating consent.**
- ❑ **This can be especially helpful for Calls for Participation, meeting registrations where there are no meeting fees, and collecting contact information for those who are interested in newsletters and other communication vehicles.**
- ❑ **Contact your Program Manager to help you set up a web site.**

CALLS FOR PARTICIPATION

IEEE SA OUTREACH TOOL

- ❑ **IEEE SA can perform outreaches for Calls for Participation in Working Groups via its marketing tool. Following specific marketing protocol and in compliance with IEEE Data Privacy Policies, the IEEE SA can reach out to Society members with fields of interest covered by the Project Authorization Request (PAR).**
 - ❑ Some Societies may require that groups submit requests directly to the Society, and then they work with IEEE SA to finalize the outreaches.
- ❑ **Those who respond to the outreach will be directed to contact the Working Group Chair or IEEE SA Program Manager directly to express interest, or they can be directed to a website to sign up.**
- ❑ **Contact your Program Manager to initiate a Call for Participation.**

WORKING GROUP ROSTERS

GROUPS AND ROSTERS

- The IEEE SA myProject system can be used to store Working Group rosters.
- All participants who access the myProject system must first consent to the IEEE Privacy Policy, which then permits you to contact them about standards development activities in which they participate.
- Any individual to be included in the roster that has a myProject account must indicate an interest in the project so the Working Group Chair can then add them to the roster and assign a member category.
- Visit the Manage Activity Profile area to indicate interest.
- Visit the Manage Committees area to build a roster.
- You can communicate to participants on your roster through myProject.

ATTENDANCE TRACKING

MEETING ATTENDANCE - IMAT

- ❑ The IEEE SA myProject system can be used for documenting meeting attendance.
- ❑ All participants who access the myProject meeting attendance tool must first consent to the IEEE Privacy Policy, which then permits you to contact them about standards development activities in which they participate.

WORKING GROUP MAILING LISTS

LISTSERV MAILING LISTS

- ❑ The preferred tool for Working Group mailing lists is the IEEE Listserv.
- ❑ Your IEEE Program Manager can help you with setting up an IEEE Listserv so that you will be compliant with IEEE Data Privacy Policies.
- ❑ Each IEEE SA Standards Committee or Working Group may have private Listservs (e.g., for members, officers, or subgroup members only) and public Listservs (for all interested individuals).
- ❑ Information on IEEE Listserv is available at <https://listserv.ieee.org/cgi-bin/wa?HOME>
- ❑ Requesting a Listserv
<https://listserv.ieee.org/request/add-listserv.html>

MAILING LISTS

- ❑ It is preferable to construct lists where consent to the IEEE Privacy Policy and any Terms and Conditions are obtained before the personal data can be submitted. Alternatively, if it is not possible to obtain consent, each person on or added to the list must receive a Welcome email that explains the purpose of the list and how their personal data was obtained, and provides the ability to unsubscribe.
- ❑ Communication to the mailing list must map to the purpose of the list.
- ❑ All mailing lists shall have the option to “unsubscribe from this mailing list”, and all requests to unsubscribe must be honored promptly.

CONFERENCE/MEETING REGISTRATIONS

VTOOLS

- ❑ **IEEE Meetings Conference and Events (MCE) provides tools that are compliant with Data Privacy Policies and that can be used by volunteers for event planning.**
- ❑ **It is recommended that vTools Events be used for events with paid registrations.**
- ❑ **You will need to establish a PayPal account and have an IEEE Concentration Banking Account for these registrations.**
- ❑ **Contact your Program Manager to help establish paid meeting registrations.**
- ❑ **vTools (<http://sites.ieee.org/vtools/>)
*Tools provided by IEEE Member and Geographic Activities (MGA) such as event tools and eNotice.***

DOCUMENT REPOSITORIES

IMEET

- ❑ **IEEE SA can provide a Working Group presence on its iMeet space, where Working Group documents can be stored.**
- ❑ **This third-party tool cannot be directly linked to the IEEE CMS, so the Working Group is responsible for validating each person added to the group to ensure that they have accepted the IEEE Privacy Policy.**
- ❑ **Communication can be sent out via iMeet to all those who join the Working Group space.**
- ❑ **Contact your Program Manager if you would like a space set up for your Working Group.**

IEEE GOOGLEAPPS

- ❑ Every IEEE members has as a benefit the ability to obtain an IEEE GoogleApps account (Google Mail, Google Calendar, and Google Drive).
- ❑ Working Group officers are required to have IEEE and IEEE SA membership, and are encouraged to use IEEE email addresses if they post their contact information on the Working Group web site, or a public area.
- ❑ It is preferred that any IEEE Data that is downloaded be store on an IEEE Google Drive, and deleted after use.
- ❑ If the IEEE Working Group officer is not able to use Google Drive, contact sa-dataprivacy@ieee.org to help with finding an alternate solution.
- ❑ To request an IEEE GoogleApp, visit <https://www.ieee.org/membership/products/google-apps.html>

WEB CONFERENCING

JOINME AND WEBEX

- ❑ **JoinMe and Webex are webconferencing tool that can be made available to IEEE SA Working Groups for electronic meetings.**
- ❑ **This is a third-party tool, and is not linked to the IEEE CMS. Any participant added to an invite should have previously provided consent to obtain the invite or self-selected to participate (e.g., by being a part of a Listserv communication). Otherwise, the participants must first be validated for consent to the IEEE Privacy Policy using the List Validator prior to being sent the dial-in information.**
- ❑ **Alternatively, the Working Group can use their website to collect registration for the webconference in a compliant manner (which includes consent to the IEEE Privacy Policy), and then an email with the dial-in information can be sent directly to registrants. It is preferred that email sent to the group has a blind copy to the registrants so that you are not revealing personal information (email addresses) unnecessarily. This also prevents circulated emails from being used by external entities who could gain access to the email.**
- ❑ **Contact your Program Manager for access to these tools.**

RESOURCES

TRAINING

□ Training

- GDPR Training (<http://sites.ieee.org/gdpr/training/>)
Overview of GDPR and responsibilities of IEEE Data Users

- List Validator training
(<https://docs.google.com/document/d/1drljHbJyZhdgx8jb6veB5QqiUAVGQ23fqO8uDipqtZQ/edit>)
Training on use of the List Validator tool

OTHER RESOURCES

- Visit sites.ieee.org/gdpr for various volunteer resources.

QUESTIONS?



sa-dataprivacy@ieee.org

For questions on the IEEE Privacy Policy:

privacy@ieee.org
