

## **Membership Data Policy**

### **I. Databases and Membership Lists**

#### **A. Comprehensive security measures**

1. All database users must lock or logoff computers that are mapped to membership databases before leaving the workstation.
2. The alphabetical membership directory shall be kept in the Membership Coordinator's office, which shall be locked when not in use.
3. Printed membership lists may not be left in public areas or on desks; they must be kept in filing cabinets or locked desk drawers. When membership lists are disposed of, they must be destroyed.

#### **B. General Restrictions on Use of Data from All Databases**

These apply to all staff, chapter chairs, elected officers, borough committee chairs and makers of ad hoc requests

1. Use only for union business. Use for election purposes is forbidden except as specifically permitted under the PSC Constitution, the Rules Governing All General and Chapter Elections, and Department of Labor regulations.
2. Ensure that proper security measures are taken both with electronic files and printouts.
3. Maintain confidentiality.
4. Upon receipt of an updated list, the previous list shall be destroyed.
5. Once per year, recipients of membership data must sign an acknowledgement that they have read these rules and will comply with them. (See Appendix A.)

### **II. Individual Databases**

A. **NYSUT** - This is the database of record for PSC membership information. It contains SS numbers, NYSUT ID numbers, date joined, title, date of birth, date of hire, home and work contact information, chapter designation, college, department, membership status, electoral information, COPE participation, leadership committee membership, AAUP membership, payroll data and dues deductions. Lists and downloads for mailings to school and home, including for PSC elections, are generated from this database.

1. Access rights: Membership Coordinator, Membership Department staff; Contract Enforcement staff, other PSC staff and Principal Officers through "look-up" computer or Access database.
  - a. During the months of October and March, the Membership Coordinator shall provide the Chapter Chairs with electronic data for their chapter including the following information: Member ID, Name, Member Status, College, Title, Department, COPE Participation, Work Phone, Home Phone, Cell Phone, Work E-mail and Home E-mail.
  - b. During the months of October and March, the Membership Coordinator shall provide the Organizing Director with a separate Excel file for each campus including the following information on teaching adjuncts, graduate assistants

and continuing education teachers: Member ID, Name, Member Status, College, Title, Department, Work Phone, Home Phone, Cell Phone, Work E-mail, and Home E-mail. The Organizing Director will distribute these files to the Part-Time Liaisons.

2. Changes to the database may only be made by Membership Department staff.
3. Security measures: Membership Department staff have access to the database through a direct NYSUT VPN connection. One computer is available to other authorized PSC staff to gain direct access to the membership database.

B. **CUPS/CUNYfirst** – This information is received from CUNY once per semester. It includes name, address, title, title code, job number, salary, college name, department, department code, tenure status, tenure date, annual/hourly compensation, appointment hours, leave type, leave %paid, and date(s) of hire. This database contains the information most useful for research purposes.

1. Access rights: Principal Officers, ED, Associate ED, Membership Coordinator, Director of Policy and Research, Director of Legal Affairs, Director of Contract Enforcement, Coordinator of Contract Enforcement, Organizing Director, Administrative Assistant-Information Management. Upon request to the Membership Coordinator, chapter chairs may receive a disk or flash drive with the data for their chapter membership, but are required to sign an acknowledgement of the rules for use (See Appendix A).
2. No changes to the data are made between downloads from CUNY.
3. Security measures: Access controlled through mapping of drives on individual PCs and through the active directory domain.
4. Restrictions on use of data
  - a. Chapter chairs who obtain CUNYfirst data must authorize its use by any other party and shall report to the Chapter EC the names of those authorized to review or use the data.
  - b. The results of any such review shall be reported to the Chapter EC, which shall determine whether the results may be published or made public.
  - c. Reports on the campus utilization of CUNYfirst data shall be sent to the PSC Executive Director.
5. Research Protocols [to be drafted]

C. **Organizer Database** – This database enables organizers to have access to the NYSUT and CUNYfirst data and add notes on areas, such as member participation, class schedule and class location. It also enables staff organizers to generate lists for their own use.

1. Access rights: Principal Officers, all organizing staff, ED, Associate ED, Director of Legal Affairs, Director of Contract Enforcement, Director of Policy and Research, Communications/Legislative Associate, Coordinator of Contract Enforcement, Administrative Assistant-Information Management, Administrative Assistant to Associate ED and other staff as designated by the ED or Associate

ED. Reports from this database shall be available to chapter chairs upon request and as needed.

2. Changes to first name, email, telephone and department fields shall be made directly by organizing staff or other staff designated by the ED or Associate ED who will input data from various contact sheets. The Administrative Assistant-Information Management will provide the Membership Coordinator with monthly reports of changes to first name, telephone numbers, e-mails, and departments so that the main membership database can be updated accordingly. All overwritten NYSUT data in the Organizer database will be saved in a permanent history file. The membership database must be updated with new contact and department information before the next download is generated for the Organizer database so as to avoid overwriting new information with old.
3. Security measures: Access controlled through mapping of drives on individual PCs and through the active directory domain

**D. Political Database** – This database enables principal officers and designated staff to search and generate lists of members' COPE participation, city, state and federal legislative districts and party affiliation. It is physically combined with the Organizers database in Access; the district data is updated at least twice per year.

1. Access rights: Principal Officers, Legislative Representative, ED, Associate ED, Director of Policy and Research, Organizing Department staff, Membership Department staff, Communications/Legislative Associate, Administrative Assistant to the Associate ED, Administrative Assistant-Information Management and other staff as designated by the ED or Associate ED
2. Once per semester or as required for an election cycle, the Membership Coordinator or Administrative Assistant-Information Management shall provide the Director of Policy and Research with an Excel file for distribution to each chapter chair, Borough Coordinator and COPE Coordinator with only the following fields for active members and retirees in their chapter or borough: Name, College, Title, Department, Chapter, COPE Contribution, Work Phone, Work E-mail, Home Phone, Home Email, Cell Phone, Congressional district, State Senate district, Assembly district, City Council district, and Party Affiliation.
3. Changes to first names, telephone numbers, e-mails, and departments may be made by designated staff or may be given to the Membership Department staff for direct entry into the membership database. All overwritten NYSUT data will be saved in a permanent history file. The changes to first names, telephone numbers, e-mails, and departments will be included in the monthly reports that the Administrative Assistant-Information Management provides to the Membership Coordinator. The membership database must be updated with new contact and department information before the next download is generated so as to avoid overwriting new information with old.
4. Once a year shortly after the voter registration deadline or as requested, the Membership Coordinator shall request party affiliation data from NYSUT or other

parties to be determined. The Administrative Assistant-Information Management will import this data into the organizer/political database.

5. Security measures: Access controlled through mapping of drives on individual PCs and through the active directory domain

**E. Leadership Directory**

1. Access rights: Principal officers and all staff
2. The Membership Coordinator shall update the Leadership Directory annually and on an as needed basis.
3. Security measures: Access controlled through mapping of drives on individual PCs and through the active directory domain

**III. Member Requests for Data - Subject to Written Acknowledgement of Rules for Use (Appendix A)**

- A. By elected chapter leaders – Elected chapter leaders must obtain membership information through their chapter chair.
- B. By department representatives or chapter committee members – Each semester, chapter chairs, in consultation with their campus organizer, should submit to the Director of Organizing an updated list of department representatives/chapter committee members to whom they want to give membership data along with signed Appendix A forms. Chapter chairs may then provide department reps or chapter committee members data from CUNYfirst or reports from the Organizer database.
- C. By members holding no elected office – Members holding no elected office are entitled to membership information in accordance with the PSC Constitution and the Rules Governing All General and Chapter Elections.
- D. Special requests must be submitted to the Membership Coordinator and approved by the ED or Associate ED.

**IV. Use of Membership Information for Research Purposes**

The principal officers shall establish an institutional research committee to review requests by union committees and members to use union databases for research purposes with respect to the appropriateness of the purpose and the adequacy of security measures.

**V. Effective Date, Amendment, and Distribution**

- A. The Membership Data Policy shall be made effective as of the date of adoption by the PSC Executive Council and shall supersede all prior PSC policies concerning the same subject. The PSC Executive Council, may amend from time to time as it deems appropriate, those provisions of this policy as pertain to PSC officials and PSC members. The PSC Principal Officers may amend, from time to time as they deem appropriate, those provisions of the policy as pertain to PSC employees.
- B. The Membership Data policy shall be distributed to all PSC employees and provided to all PSC officials who routinely receive membership data or make a request for data.

Any questions or comments about this policy should be directed to Anais Surkin, Associate Executive Director at [asurkin@pscmail.org](mailto:asurkin@pscmail.org) or (212) 354-1252 x275.

Effective: March 4, 2010  
Revised: January 9, 2014

Appendix A  
Membership Data  
Rules for Use

I have read the attached Membership data policy and agree to comply with all of its provisions.

**Summary**

1) **Purpose:** Membership data is to be used for the good of the entire bargaining unit. It is to be used in a manner that serves the common interests of the members of the PSC. The following procedures are meant to insure that these purposes are fulfilled, to protect the confidentiality of membership information, and to give guidance to those analyzing this data.

**2) Comprehensive Security Measures**

- a. All database users must lock or logoff computers that are mapped to membership databases before leaving the workstation.
- b. The alphabetical membership directory shall be kept in the Membership Coordinator's office, which shall be locked when not in use.
- c. Printed membership lists may not be left in public areas or on desks; they must be kept in filing cabinets or locked desk drawers. When membership lists are disposed of, they must be destroyed.

**3) General Restrictions on Use of Data from All Databases**

These apply to all recipients of membership data.

- a. Data are to be used only for union business. Use for election purposes is forbidden except as specifically permitted under the PSC Constitution, the Rules Governing All General and Chapter Elections, and Department of Labor regulations.
- b. Ensure that proper security measures are taken both with electronic files and printouts.
- c. Maintain confidentiality.
- d. Upon receipt of an updated list, the previous list shall be destroyed.

**4) Restrictions on Use of CUNYfirst Data**

- a. Chapter chairs who obtain CUNYfirst data and reports from the Organizer database must authorize its use by any other party and shall report to the Chapter EC the names of those authorized to review or use the data.
- b. The results of any such review shall be reported to the Chapter EC.
- c. The Membership Coordinator shall provide annual reports to the ED of all those who have signed authorization forms.
- d. Reports on the campus utilization of CUNYfirst data and reports from the Organizer database shall be sent to the PSC Executive Director.

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Signature

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Date

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Print Name