

The Pony Club Code of Conduct for using PELHAM database and Branch Emails

Rationale

There is increasing pressure on all organisations, particularly those involved with Youth and Volunteering activities, to ensure that all data is handled securely and with respect. Following the recent move to manage all Branch and Area email addresses on Microsoft O365 the email address and password also gives access to the Pelham database, our core repository for Membership and Volunteer information.

The data held in Pelham is increasingly being used to analyse member experiences, Coach information and qualifications, tracking Member Achievements and Tests, and very soon, participation at Rallies and Events.

It is crucial therefore that the data is held securely, updated and accessed appropriately by our valued Volunteer army of Branch and Area officials.

PELHAM

Access to the Pelham system is restricted due to cost challenges. Access is outlined below:

Standard access – one log in per Branch, provides the ability to view and update:

- Member, coach and volunteer information
- Update of qualifications, achievements and tests,
- Send emails from within Pelham using the Branch email address
- When available, Rallies and Events

Access: Branch email address and password (NB these are now THE SAME)

Read-only access – one log in per Branch, provides the ability to VIEW data as above. No updates possible with this level of access and not able to send emails.

NB: it is not possible to restrict access to a certain set of information, such as only all Coach or Event data to be visible to certain users.

As the Branch email and standard log-in to Pelham are the same the Branch Committee and DC must agree who should have access both to monitor the email and update Pelham. It is **STRONGLY RECOMMENDED** that no more than 4 people should have access to Pelham to make changes in Pelham.

The Branch DC must ensure that only Volunteers, preferably Committee Members, with a GENUINE NEED to access this information are to be given access to Pelham. Each Branch should complete the form below and each Volunteer needs to sign so we can keep complete transparency on those with access to the Membership and Coach data.

Email

Branch email addresses:

dc.branch@pcuk.org – for use by DC's ONLY. Used for general communications, usually the same content as the Branch email HOWEVER will also be used for DC ONLY sensitive communications. DC approval emails will be sent here as well as the Branch email.

treasurer.branch@pcuk.org – for use by Treasurers ONLY. All Finance information will be sent to this address AND the DC address

branch@pcuk.org – used as previously for main communication to Branches from the Pony Club Office, Area Representatives and other Senior Volunteers are required. It is recommended that the Branch Secretary have access to and manage this Inbox.

Guidance for using email and language can be found here: pelham.pcuk.org

Top tips:

- **Consider your audience**
 - Think about who is going to read the email and use appropriate language.
 - Think about the goal of the email – what are you trying to achieve? Is it communication only not requiring an answer? If you need action, headline that in the first paragraph so that the reader knows you are going to ask them to do something.
 - Be aware that 3rd parties may read your correspondence (requests for Subject Access Requests are increasing) so do not write anything you would not be happy for a parent, member or fellow volunteer to read.
- **Order your message**
 - If you need to set any context for the email, do that first. For example, you may be sharing information about a specific event or events – state this and share the link to it at the top and bottom of the email.
 - Keep your message as brief and clear as possible. In a formal email, use direct, literal language and be concise and specific.
 - Consider using bulleted lists or images to facilitate understanding.
 - If you are asking for action, be clear what the action and timeline is.

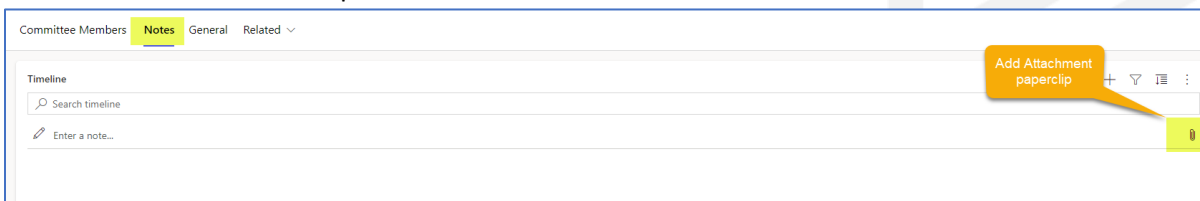
DECLARATION

As a named Pelham / Branch email user below, the Volunteer confirms that they:

- Have DC approval to access the PC Pelham system and Branch emails
- Will not share the password with anyone not on the approved list below
- Will treat the personal information contained in Pelham with respect and not share it with other PC Volunteers, Parents or Members unless there is a clear justifiable need (eg contact details during camp)
- Understand and agree that their access to the data is to support successful running of Branch activities only.
- Agree that information on PELHAM must not be used for personal gain or commercial activities
- **When a Volunteers' access is removed, a password reset must take place and the form below updated with the end date.**

Volunteer Name	Role	Email - DC/TR/BR	Pelham Edit/RO	Reason for access	Start date	End date
J. Bloggs	DC	DC	Edit	Access to member and coach information		
J.Doe	Secretary	BR	Edit	Send emails from Pelham		
B. Eno	Committee	n/a	RO	Checking members for Rally attendance		

This document must be completed and stored in the Branch Committee Notes section on Pelham -



It is intended as an “audit” of those who have or have ever had access to Pelham hence if a Volunteer no longer has access their name should remain on the Declaration Form with the appropriate end date. This will be monitored for Compliance.