

PURDUE DATA TRAINING FOR VOLUNTEER LEADERS

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Volunteer Data Training

Purpose: This training outlines the appropriate and ethical use of personal data submitted by individuals during event registration. We trust and value you as leaders, so striving to provide the information necessary to enhance our partnership in helping alumni, friends, and fans, stay connected, get involved, and give back.

Understanding and adhering to these guidelines is crucial for maintaining the trust of Purdue alumni engaging with Purdue for Life Foundation's programs and ensuring of responsible data handling.

Response: A key area of improvement based on leader feedback and commissioned through the Purdue Alumni Clubs Task Force.

Resolution: Providing limited alumni data to trained volunteers relevant to their facilitated events.

Responsibility: Reviewing the information shared, guidelines for this data, legal and organizational constraints and consequences.



Volunteer Data Training

Data that is to be shared: Constituent

Name	Email	Phone	City (Phase 2)
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Event-Specific Communications: Data collected during event registration is specifically intended to facilitate a positive and ongoing relationship with participants. Its appropriate use is therefore limited to communications directly relevant to the registered event and subsequent engagement with Purdue for Life.

Approved Usage

- Engaging Participants: Sharing information and fostering interaction during the event.
- Informing Participants: Providing updates on last minute logistical changes.
- Welcoming Participants: Extending a positive and inclusive greeting / event atmosphere.
- Expressing Gratitude: Acknowledging their participation and support.
- Distributing post-event surveys and materials directly relevant to the event.
- Responding to individual inquiries and providing participant support related to the event.

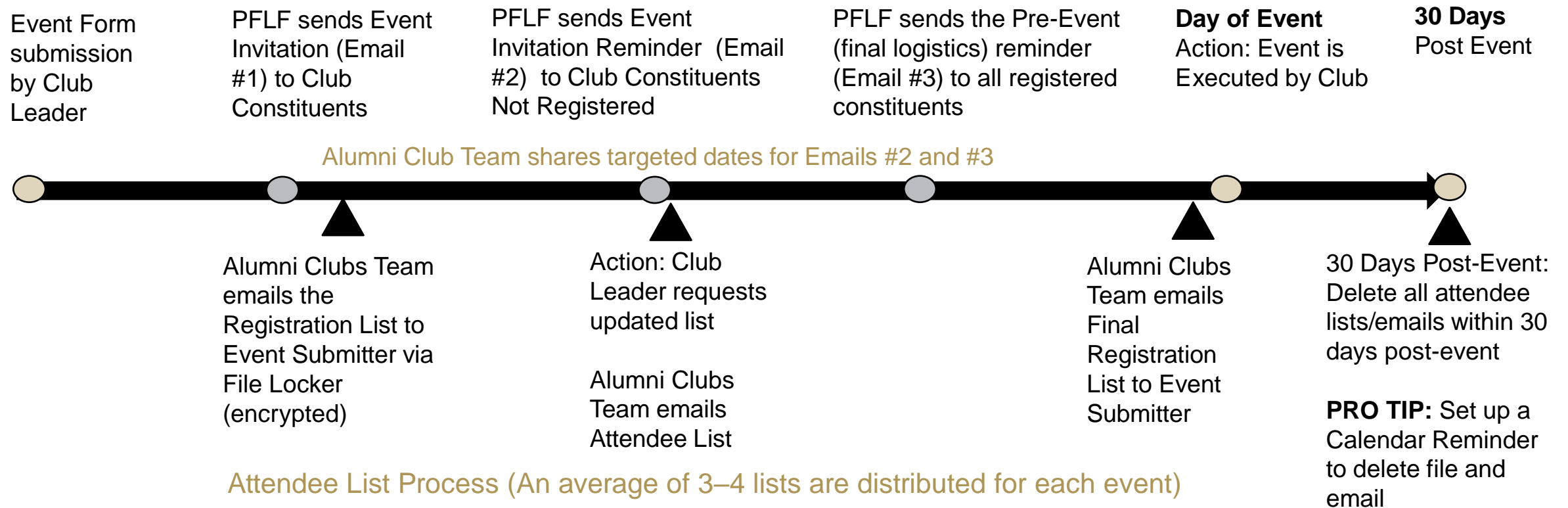
Summary: Ensure all communication utilizing registration data aligns with these defined purposes, respecting the context in which the information was provided and fostering a meaningful connection with Purdue for Life.



Managing Volunteer Data Cycle

Access to Volunteer Data does not replace the Event Form Process. Use of registrant contact information is not required for each event, it's optional based on each event's needs

Example: Event Submission 30 days from Event



Event-Specific Use of Registrant Information

Contacting registrants is not required—use will vary by event needs. All communication must stay focused on the specific event and align with the context in which participants shared their information.

Key Principle: Registrant data must be used solely for event-related purposes—to inform, engage, and build a meaningful connection with Purdue for Life.

Pre-Event

- Distributing tickets for sporting events
- Confirming last-minute dietary or accessibility requests
- Coordinating logistics for tournaments (e.g., match play formats, pairings, foursomes)

Event Day

- Sharing urgent logistical updates (parking changes, ticket pick-up details, safety/weather alerts) - Note: Formal event cancellations involving registration fees are always managed by the Alumni Club Team, who will notify registrants and begin cancellation/refund processes

Post-Event

- Thanking attendees for their participation and support
- Sending post-event surveys or sharing materials relevant to the event
- Responding to individuals who requested more information during the event, had follow-up questions or to support requests
- Add-ons: In combination of post-event specific follow-up, you might include information on upcoming events and announcing opportunities to get involved in club leadership/committees



Why Adhering to This Training Matters

Grounded in the Purdue for Life Foundation Data Policy

Foundation Policy: The Guiding Framework

This training is grounded in the **Purdue for Life Foundation Data Access & Compliance Policy**, which outlines:

- Data is **classified as restricted**
- Usage is limited to **approved engagement activities**
- Access does **not equal authorization**
- Misuse or unauthorized release is **strictly prohibited** and may result in disciplinary or legal action

Constituent Trust is Paramount

- Purdue for Life Foundation data is classified as restricted in recognition of the privacy rights of our alumni, donors, and friends.
- This classification reflects our ethical responsibility and is reinforced by federal, state, and Purdue regulations.

Data Use is Purpose-Driven and Permission-Based

- Access to alumni data is strictly limited to Purdue-sponsored or approved engagement functions.
- Even if you can access data this does not mean you are automatically authorized to use them.

A Shared Commitment

We share this data with you to help **build stronger alumni connections**—and we count on you to honor that trust by **adhering to Foundation policy every step of the way**.



Volunteer Data Training – Unapproved Usage

Use for Unrelated Purposes: Registration data **must not** be used for purposes beyond the scope of the registered event without explicit and informed consent from the individual.

Recognizing and Avoiding Incompatible Data Usage

- **Official Communications from PFLF:** Which includes initial event invitation, scheduled reminders and pre-event reminder email. Avoid sending duplicate emails of what is already provided by PFLF per your event submission form.
- **Marketing unrelated events, products, or services:** Using registration data to promote activities or offerings that are not directly associated with the event the individual signed up for or their ongoing engagement with Purdue for Life.
- **Sharing or selling data to third-party organizations:** Providing participant information to external entities for their own marketing or other purposes, without the explicit consent of the individual.
- **Adding to unrelated mailing lists:** Including participants in email or contact lists that are not specifically about the event they attended.
- **Using for general institutional marketing not tied to the event or Purdue for Life:** Employing the data for broad university promotions that are not a direct follow-up to the event experience or part of the Purdue for Life program.
- **Uploaded to or processed by generative AI tools.**
- **Analyzing data for purposes unrelated to event evaluation or Purdue for Life engagement:** Using the information for research or reporting that doesn't directly aim to improve future events or enhance the Purdue for Life community.

In essence, an incompatible purpose is any use of the event registration data that deviates from the explicit and implied understanding that the information was provided to support event participation and foster a continuing connection with Purdue for Life.



Volunteer Data Training – Security is Key

This guidance outlines essential principles for volunteers handling event registration lists to ensure data security and maintain the trust of our participants. As volunteers entrusted with this personal information, you play a vital role in protecting it.

Access Responsibility:

- **Focus on Your Role:** Only access the registration list when it is essential for your assigned volunteer duties related to the event (e.g., checking attendees in, preparing name tags). Avoid looking at the list out of curiosity.
- **Digital Security:** If you access the list on a personal device, ensure it is protected with a strong password. Be cautious about where you save the file and avoid sharing your device login.
- **Physical Security:** If you are given a printed list, keep it in your possession or a secure location during the event. Do not leave it unattended in public areas.

Information Sharing:

- **Limit Sharing:** Do not share the registration list or individual participant details with other volunteers or individuals unless it is absolutely required for the smooth operation of the event.
- **Secure Communication:** You should not be sharing these attendee reports and registrant contact information with anyone.

Data Retention and Disposal:

- **Temporary Use:** Understand that your access to the registration list is typically for the duration of your volunteer activity related to the specific event.
- **Secure Disposal:** Once the event is over and you no longer need the list for your volunteer tasks, return any physical copies to the designated volunteer leader for secure disposal. If you have a digital copy (as permitted), delete the file from your device. Do not keep copies after the event unless specifically instructed to do so.

Respecting Privacy:

- **Workspace Awareness:** Be mindful of who can see the list if you are working with it in a public area during the event.
- **Focus on Purpose:** Use the information only for the purpose of supporting the event. Do not use it to contact participants for personal reasons or share their details outside of your volunteer role.



Volunteer Data Training – Roles & Responsibilities

Purdue for Life Foundation staff commitment:

- Facilitate the event posting and marketing cloud email event campaign
- Pull the relevant registration data and share via a secure channel
- Provide tools/platforms that limit liability exposure (i.e. HandsOn Connect, Purdue Ties, BrightCrowd, etc.)
- Provide access process and training on an annualized basis or more frequently
- Respond in a timely manner to technical or support requests

Volunteer Leader commitment & responsibility:

- Attend training and sign data access agreement form annually or more frequently
- Limit data exposure to a maximum of two trained volunteers per specific event
- Access through secure channel and do not upload or store to shared drives/devices
- Do not keep shadow databases or utilize outside of set data usage parameters
- Do not share data with non-approved & trained volunteers or vendors.
- Do not keep the data for more than 30 days post-event and utilize to communicate after this timeframe

PFLF constantly updates communication preferences for constituents based on opt-in/opt-out mechanisms, therefore the list should be deleted as static lists are considered stale after a two-week window.



Final Reminders

Training

- Club Presidents and Event Organizers must complete this training; other board and committee members are encouraged to do so

Event Form & Communications

- All club events must have an **Event Form** submitted.
- The event-related communications process (invitations, reminders, pre-event emails, newsletters) has not changed. We will continue to use the current Engagement and Event Request (event form) and manage the communications process via the **Alumni Clubs/BBC Teams**.

Attendee Data Use

- This is an optional tool***—event organizers may use registrant contact information only as needed and **only for communications related to the specific event** the individual signed up for
- All attendee information will be sent encrypted via File Locker
- The attendee list with contact information **may only be shared with club leaders and volunteers who have completed this training. It cannot be distributed broadly.** If you are unsure who in your club has completed the training, please contact alumniclubs@purdueforlife.org
- Club leaders must delete attendee lists and related emails within 30 days
- IMPORTANT:** If email is the chosen communication method and to protect everyone's privacy, send the email in the "To" field to yourself or to your club email and please BCC the rest of attendees to preserve the privacy of the information.

Be Strategic with Outreach

- For events submitted **30+ days in advance**, plan around your **3 key emails**: Event Invitation, Reminder, Pre-event logistics
- Avoid **over-communicating**—too many emails cause opt-outs, which are difficult to reverse.

Event Cancellations

- If registration fees are involved, cancellations must be managed by the **Alumni Club Team**.
 - During office hours: alumniclubs@purdueforlife.org
 - After hours: mchelp@purdueforlife.org

To	<input type="text" value="Your email"/>
Cc	<input type="text"/>
Bcc	<input checked="" type="checkbox"/> Lutz, Ilenia H. <input checked="" type="checkbox"/> Williams, LeAnne E.



Questions?

Next Steps:

- **Action Required:** To begin receiving event-specific registrant and contact information, please review the following after completing this training and sign the Volunteer Coordinator Data Agreement form.
- This training will be reviewed annually and updated as needed to reflect any substantial changes. All participants will be informed of updates to ensure continued accuracy and relevance

Questions

- Training - jbhartman@purdueforlife.org
- Alumni Club Processes: alumniclubs@purdueforlife.org

Thank You!

