

# **Privacy Policy**

Canadian Society of Zoologists  
Approved by CSZ Council, 3 December 2006

## **General Statement**

The Canadian Society of Zoologists (CSZ) strives to comply with Canadian Federal legislation, (the Personal Information Protection and Electronic Documents Act) governing the use, collection and disclosure of personal information in the course of our activities. Key provisions of this Act are that organizations are required to seek the consent of individuals prior to collecting, using or disclosing their personal information; organizations must protect personal information with security safeguards appropriate to the sensitivity of the information; and individuals may access personal information about themselves held by an organization and have it corrected, if necessary.

We have implemented a Privacy Policy in order to do so. Our Privacy Policy addresses the collection, use and disclosure of personal information. Personal information is information about an identifiable individual and does not include information about corporations, partnerships, or other non-individuals. The personal information the CSZ collects will depend on the service we provide to you. The CSZ is committed to maintaining the accuracy, confidentiality, and security of our members' personal information. We may collect, use and disclose personal information to respond to applications for membership, to provide our services to you and/or to further the aims of the CSZ, which include the promotion and advancement of zoology.

Our Privacy Policy strives to comply with the following ten Privacy Principles:

- Principle 1 - Accountability
- Principle 2 - Identifying Purposes
- Principle 3 - Consent
- Principle 4 - Limiting Collection
- Principle 5 - Limiting Use, Disclosure and Retention
- Principle 6 - Accuracy
- Principle 7 - Safeguarding Customer Information
- Principle 8 - Openness
- Principle 9 - Individual Access
- Principle 10 - Handling Customer Complaints and Suggestions

### **Principle 1 - Accountability**

The CSZ is responsible for all Personal Information under its control and has designated the Secretary and the Treasurer of the Society as its Privacy Officers, who shall be responsible for ensuring that the Society complies with the provisions of this Privacy Policy and with the ten Privacy Principles, as listed above.

The CSZ, collects information from its members and customers to fulfill their expected obligation that the CSZ has to them, and to ensure that the correct information is used to aid in the provision of member services and/or to further the aims of the CSZ, which include the promotion and advancement of zoology.

The following individuals / committees see some or all of the membership data: CSZ Executive, CSZ Archivist and staff of the archives which are stored at the Canadian Museum of Nature, CSZ Membership Committee, CSZ Bulletin Editor, CSZ Auditors, CSZ Local Organizing Committees, CSZ Section Chairs and/or Section Secretaries, persons receiving our annual Directory of Members, persons receiving other publications of the Society such as the program of the Annual Conference, and trusted third parties such as the Canadian

Federation of Biological Sciences, the NRC Research Press, Outside Service Suppliers, and financial institutions which process any payments you have sent us.

When we provide personal information to a third party, we provide only that information required to fulfill a member request and/or to further the aims of the CSZ, and we use contractual means to provide a comparable level of protection of personal information to that found in this Privacy Policy.

## **Principle 2 - Identifying Purposes**

At the CSZ, we gather and use personal information to provide you with the member services you have requested and/or to further the aims of the CSZ, which include the promotion and advancement of zoology. Providing us with your personal information is always your choice. Most of the information we collect comes directly from you, and only with your consent. For example, when you request membership or order services online, by mail, by telephone, or in person, we will ask you to provide the information that enables us to complete your request or to provide you with better service. When you provide the information, it is presumed that you consent to the use of your personal information for purpose for which its collection was intended.

Personal information is information that refers to you specifically. With your consent, we may gather personal information from you in person, over the telephone or by corresponding with you via mail, facsimile, or the Internet.

The CSZ collects information from its members, to fulfill their expected obligation that the CSZ has to them, to maintain historical records of the CSZ, to ensure that the correct information is used to aid in the mailing of publications to members and selling of saleable products to members and/or to further the aims of the CSZ, which include the promotion of zoology.

We maintain the following basic identification and contact information for you in our Master Membership Database to produce and/or to send you publications or other information items about the CSZ and its activities, or notification about selected events or activities outside the CSZ where that notification has been vetted by the Council of the CSZ:

- Name
- Title
- Mailing address
- E-mail address
- Telephone number
- Fax number
- Conference attendance
- Journal orders
- Member history
- Membership type

The Local Organizing Committee of the annual conference of the CSZ may collect and maintain any information appearing on the registration form that you submit for the conference for the purposes of organizing the conference and administering any payments you make, and for submitting the following information to the CSZ for updating of the Master Membership Database.

- Name
- Title
- Mailing address
- E-mail address

- Telephone number
- Fax number
- Membership category
- Section affiliations

We may maintain the following personal information to assist with the financial, accounting and legal reporting requirements and procedures of the CSZ:

- Credit card information
- Social insurance or equivalent taxpayer identification number
- Details of payments made by you to the CSZ
- Details of payments made to you from the CSZ

In addition, we may maintain additional personal information to document, via newsletters or other publications, our web site, or in our archives, the activities and history of the CSZ:

- Your photograph
- Membership category
- Section affiliations
- Membership history
- Activities, interests, awards and participation details in the CSZ, including, but not limited to, information about your accomplishments in the field of zoology
- Information submitted to us from you or your nominator(s) as part of an awards or election process
- Correspondence between you and the CSZ

#### *Anonymous/Non-Personal Information*

Some personal information from you may be summarized into a form that removes personal reference to you before your personal information is destroyed, for analysis of trends in activities of interest to the CSZ,.

The anonymous/non-personal information gathered from the CSZ web site is used primarily for technical, research and analytical purposes such as evaluating web site activity. This information does not include any personal information and it is only retained until its intended purpose is fulfilled.

When you visit the CSZ web site, information is not collected that could identify you. You are welcome to browse the Web site at any time anonymously and privately without revealing any personal information about yourself.

### **Principle 3 – Consent**

The choice to provide us with personal information is always yours. You may withdraw your consent at any time. However, your decision to withhold particular details may limit our ability to provide you with some services. If we are unable to accommodate your request based on the information that has been provided to us, we may ask for additional details in order to identify other manners to provide assistance.

We are obliged to keep your personal information confidential except under the following special circumstances:

- When authorized by you
- When required by Canadian law
- When permitted by Canadian law

### *When Authorized by You*

Personal information, such as name, address, phone, and email, is collected and used with the individual's implied or explicit consent. When you submit a membership application form, either on paper or electronically from the website (<http://www.csz-scz.ca/>), or when you correspond with the CSZ, or when you participate in any activity of the CSZ that is related to the goals of the CSZ, including, but not limited to, meetings, public events organized by the CSZ, mailing lists, discussion forums or other events, both offline and online, you are giving implied consent to use the information you provide for any of the purposes stated in Principle 2. When you provide us sensitive personal information (such as a cheque, credit card number, or taxpayer identification number by any means whether verbal, email or hard copy) you are giving us explicit consent for one-time use of that information only for the specific use for which it was provided, such as payment of dues or fulfilling legal reporting requirements.

With respect to the matter of privacy, we use the personal information to respond to any application for our services and to provide our services to you, as well as in the following ways:

- to facilitate the provision of services you have requested by sharing your information with third party service providers such as for journal orders placed through us for the NRC Research Press
- to investigate potentially fraudulent or questionable activities regarding the use of our services

In some cases, such as when you apply for membership or place an order over the telephone, your consent to the use and/or disclosure of your information will be obtained verbally. In other cases, your consent may be obtained in writing or electronically.

### *When Required by Law & Permitted by Law*

The type of information we are legally required to disclose may relate to criminal investigations or government tax reporting requirements. In some instances such as a legal proceeding or court order, we may also be required to disclose certain information to authorities. Only the information specifically requested would be disclosed and we would take precautions to satisfy ourselves that the authorities that are making the request have legitimate legal grounds to do so.

### **Principle 4 - Limiting Collection and Retention of Personal Information**

The personal information collected must be limited to those details necessary for the purposes identified by the CSZ and/or to further the aims of the CSZ, which include the promotion and advancement of zoology.

The CSZ will only collect, use, or disclose personal information that is necessary for the Identified Purposes (see Principle 2) or as required by Canadian law. If we require personal information for any other purpose, you will be notified of the new purpose, and subject to your consent, that new purpose will become an Identified Purpose. The CSZ will only collect personal information by fair and lawful means. We will retain personal information only as long as necessary for the fulfillment of the Identified Purposes: Financial Information for seven years, or otherwise as required by law; membership applications for no longer than one year after the end of the membership year applied for; and other information related to zoological activities and the aims of the CSZ, for as long as the CSZ may from time to time determine is necessary. Information that is no longer required for an Identified Purpose will be shredded or securely deleted, as appropriate.

Information is collected by the Secretary or Treasurer of the CSZ, and other members in pursuit of the aims of the CSZ, which include the promotion and advancement of zoology.

## *Who Sees the Data*

- The Master Membership Database is seen by the following: Secretary, Treasurer, and Auditors of the CSZ.
- Membership data pertaining to mailings to members is seen by the Bulletin Editor, CSZ Local Organizing Committees, Section Chairs and/or Section Secretaries, the NRC Research Press, the Canadian Federation of Biological Sciences and Outside Service Suppliers.
- Membership data pertaining to various activities of the CSZ and its members may be seen by other members or the public.
- Financial data is seen by the Treasurer and Auditors of the CSZ, the Local Organizing Committee of any CSZ conference that you choose to attend (data only from that conference) and financial institutions which process any payments you have sent us.
- Registration information received by the Local Organizing Committee for the CSZ Annual Conference is seen by the Local Organizing Committee and transmitted to the Secretary and Treasurer of the CSZ for integration into the Master Membership Database.
- Publications, reports and minutes of meetings, selected correspondence, and an annual list of the names of CSZ members are maintained in the CSZ Archives for historical purposes and are seen by the CSZ Archivist, authorized personnel of the Canadian Museum of Nature Archives, and by persons conducting approved historical research.

## *Outside Service Suppliers*

At the CSZ, we sometimes contract outside individuals or organizations to perform specialized services such the mailing/shipping of our publications or the mailing and electronic delivery and processing of election ballots. Our trusted service suppliers may at times be responsible for processing and handling some of the information we receive from you. When we contract with our suppliers to provide specialized services, they are given only the information necessary to perform those services. Additionally, they are prohibited from storing, analyzing or using that information for purposes other than to carry out the service they have been contracted to provide. In fact, our suppliers are bound by strict contractual obligations that have been designed to protect the privacy and security of your information. Furthermore, as part of our contract agreements, our suppliers and their employees are required to protect your information in a manner that is consistent with the privacy policies and practices that we have established.

## *Publicity, Public Relations and Promotion*

In pursuit of the aims of the CSZ, which include the promotion and advancement of zoology, members of the CSZ may discuss, reveal, present or otherwise disclose personal information related to the membership history, activities, service, awards and participation details in the CSZ, including, but not limited to, information about members' zoological contributions, recorded opinions, activities and accomplishments, both offline and online, to other members or to the public, directly or through any communication medium.

## **Principle 5 - Limiting Use, Disclosure and Retention**

Personal information may only be used or disclosed for the purpose for which it was collected unless you have otherwise consented, or when it is required or permitted by law. Personal information may only be retained for the period of time required to fulfill the purpose for which it was collected or as required by law.

## *Member Files*

Electronic customer files are kept in an environment with restricted access. Likewise hardcopy files are maintained with restricted access. We will retain personal information only as long as necessary for the

fulfillment of the Identified Purposes. Financial Information is retained for 7 years, or otherwise as required by law, and then they is shredded or deleted as the case may be. Hard copies of membership applications are retained for no longer than one year after the end of the membership year applied for, and then they are shredded. Personal information may be rendered into a form that makes it anonymous before the personal information is destroyed.

### *Historical Records*

The CSZ maintains an Archives for the purpose of assembling and conserving documentation of the history of the CSZ and its activities. This material is intended to be retained indefinitely.

### *Opting out*

We specifically give all members on the membership application form the right to opt out of inclusion in any published membership directory of the CSZ, which can be exercised any time by notifying the Secretary or the Treasurer of the CSZ prior to the production of this directory.

### **Principle 6 - Accuracy**

The CSZ will maintain a member's personal information as accurate, complete, and up-to-date as is necessary for the Identified Purposes.

### **Principle 7 - Safeguarding Customer Information**

Personal information must be protected by security safeguards that are appropriate to the sensitivity level of the information.

Hard copies of personal information are kept in a locked cabinet in a locked room with restricted access. Electronic copies of personal information are kept on a password-protected computer. Electronic files containing personal information are password protected prior to storage or transmission.

We do not ask members to submit sensitive information electronically unless we have arranged a secure server environment that ensures that the confidentiality and privacy of your information is not compromised. Any personal information submitted electronically is deleted after the purpose for which it was submitted is accomplished.

Anyone who is provided access to personal information for an Authorized Purpose is made aware of this Privacy Policy and the importance of maintaining confidentiality of the information.

Appropriate methods of disposal such as shredding are used to destroy personal information that is no longer required for an Authorized Purpose.

### **Principle 8 - Openness**

The CSZ will make information available to our members concerning the policies and practices that apply to the management of their personal information.

Any member may contact the Secretary or the Treasurer of the CSZ to have any information updated or corrected.

The CSZ is responsible for all Personal Information under its control and has designated Privacy Officers who are accountable to the CSZ for the compliance of the CSZ with this Privacy Policy.

### **Principle 9 - Individual Access**

Upon request, a member shall be informed of the existence, use and disclosure of their personal information, and shall be given access to it. Members may verify the accuracy and completeness of their personal information, and may request that it be amended, if appropriate.

#### *Accessing Your Information*

You may access and verify any of your information by contacting the Secretary or the Treasurer of the CSZ using the contact information provided at <http://www.csz-scz.ca/>.

#### *Amending Your Information*

To help us keep your personal information up-to-date, we encourage you to amend inaccuracies and make corrections as often as necessary. Despite our efforts, errors sometimes do occur. Should you identify any incorrect or out-of-date information in your file(s), we will make the proper changes. Where appropriate, we will communicate these changes to other parties who may have unintentionally received incorrect information from us.

To update or change the information, please contact the Privacy Officer as indicated under Principle 10.

#### *Charges for Accessing Your Information*

We will endeavor to provide access to your information at no cost, and in any case not more than the direct expense incurred by the CSZ in fulfilling your request. However, if we decide that a charge should be levied, we will inform you of the charge and the reason for levying it, and will only charge you if you advise us that you wish to proceed with your request.

### **Principle 10 - Handling Customer Complaints and Suggestions**

Members may direct any questions or enquiries with respect to the privacy principles outlined above or about our practices by contacting:

CSZ Privacy Officer (Secretary or Treasurer of the CSZ)

Contact information:

<http://www.csz-scz.ca/>.

Before the CSZ is able to provide you with any information or correct any inaccuracies, however, we may ask you to verify your identity and to provide other details to help us to respond to your request. We will endeavor to respond within an appropriate timeframe.

- We will record the date a complaint is received and the nature of the complaint (e.g. delays in responding to a request, incomplete or inaccurate responses, or improper collection, use, disclosure or retention).
- Acknowledge receipt of the complaint promptly.
- Contact the individual to clarify the complaint, if necessary.
- Assign the investigation to a person with the skills necessary to conduct it fairly and impartially.

- Give the investigator access to all relevant records, employees or others, who handled the personal information or access request.
- Notify individuals of the outcome of investigations clearly and promptly, informing them of any relevant steps taken.
- Correct any inaccurate personal information or modify policies and procedures based on the outcome of complaints

If you do not receive acknowledgment of your inquiry or your inquiry has not been satisfactorily addressed, you should then contact the Privacy Commissioner's Office at <http://www.privcom.gc.ca> (or 112 Kent Street, Ottawa, Ontario, K1A 1H3), who will then serve as a liaison with the CSZ to resolve your concerns.

### **Updating This Privacy Policy**

Any changes to our Privacy Policy and information handling practices will be acknowledged in this policy in a timely manner. We may add, modify or remove portions of this policy when we feel it is appropriate to do so. You may determine when this policy was last updated by referring to the modification date found at the bottom of this Privacy Policy.

Updates are displayed on our website: <http://www.csz-scz.ca/> or links therein.

Date of last modification: 6 June, 2007