

GDPR compliance – Branches, Sections, Groups, Divisions and Young Dentist Groups

Frequently Asked Questions

Local officer agreement

Who needs to sign and return the BDA Local officer agreement?

All Secretaries, Treasurers and Chairs within Branches, Sections, Groups, Divisions and Young Dentist Groups, so that we know you are aware of and will adhere to the BDA's procedures for data privacy and GDPR compliance.

In addition, anyone who is currently managing personal data on behalf of your Branch, Section, Group, Division or Young Dentist Group that we may not be aware of.

Until we have received a signed agreement, we will be unable to send any personal data to you.

Local officer circulation lists

How can we maintain our Branch Council, Section / Division / Young Dentist Group committee member's circulation lists in compliance with GDPR?

With the permission of the committee members, you can continue to communicate regarding Branch, Section, Divisional or YDG committee matters using your personal email addresses. This relates to committee members only. You should not communicate with anyone outside the committee in this manner, ie: the wider BDA members in your area.

The Local Services Team can send out emails to BDA members, non-members and DCPs (where we have permission to contact them) in your area on your behalf, such as a notice regarding your season of events, an update on arrangements for an event, or a survey to gauge members thoughts on format of events etc.

Registration for events and webinars

Which events and webinars are affected by GDPR compliance and registration needing to be managed centrally?

All locally held events and webinars are affected and must operate in compliance with GDPR since 25 May 2018.

Who can book online and how is this done?

Everyone – there are two groups:

1. Those who already have a BDA website login
All BDA members, dentists who have previously been members, and dentists/DCPs who have used the online system previously, currently have a BDA website login, consisting of a username (their email address) and a password.

Once people are logged into the BDA website they can make an online booking for an event.

2. Those we can set up with a BDA website login
Anyone with a GDC number, including dentists who have never been a member, and DCPs / team members, just need to be set up with a website account.

Initially, the site will ask them to fill in a SmartSurvey form so that we can supply them with a username and password, they can then log into the website to create their own password, and then they can make an online booking.

Can we organise social events if you are managing the bookings?

Yes. But these will be managed on a case-by-case basis and we can discuss your needs and requirements with you directly to ensure the system works for you.

If you are organising a social event with no lecture attached to it, then VAT needs to be applied to the price, as the BDA is only exempt from charging VAT on educational events, ie: lectures. If you are providing a meal or buffet with your lecture and only charging one price for both, then there is no need to apply VAT to the price.

Currently there is no facility as part of the online booking system to collect dietary or special requirements, so anyone with such requests will need to email branchsectionevents@bda.org with this information. There are plans to get this incorporated into the online booking system when the new website is introduced, but the timeline for this is not finalised yet.

If people book for an event using the offline word or PDF booking form, then there is space to capture dietary requirements - this can be emailed to us. We can also take bookings over the phone at 020 7563 4590 (Mon-Fri 9am-5pm), and we would ask if people have any dietary requirements.

Can we use an external online registration system?

GDPR requires that data is collected and stored securely by the data owner. BDA data cannot be managed by a third party unless a data agreement is in place. Unfortunately, EventBrite and other similar systems, which some Branches and Sections used to use, will not work with us on this basis as they will only deal with individuals rather than organisations.

Can we take bookings for the events in our area on our local website?

Unfortunately not. Some Branches and Sections had developed good websites to help promote events and to give local members information and notice about upcoming events. Websites that have already been set up can still be used to provide information only, but they can no longer be able to contain data capture facilities or take bookings or online payments for events. Any data capture, booking or payment systems should have been disabled from 25 May 2018.

If your area has a local website which isn't being regularly maintained with up-to-date content and information, we ask that this is decommissioned as this gives the appearance of no current activity in the area, and often this is not the case.

We run joint events with other organisations, how can these continue and be in compliance with GDPR?

Joint events where an external organisation is managing the registration process, such as a deanery or LDC, may still continue so long as there is a data agreement in place between us, the BDA, and the co-

organiser/s. We can provide you with a template data agreement which will allow them to manage BDA data on our behalf and will request the delegate information is shared with us so that we can maintain an event record and history of this event. If the external organisation does not wish to sign a data agreement, then the event cannot be badged as a BDA event.

Social media and websites

Can we still host a local website to provide information about our events and webinars?

As mentioned above, local websites can no longer be used to take bookings for events or webinars, however they can be used to provide information about your events, webinars and the local branch.

Do we need to purchase a SSL certificate now that the local website will be used for information only?

No, you only need a SSL certificate for three reasons:

- E-commerce, when you're not using a 3rd party payment processor
- If there's anywhere on the site that a user logs in with a username and password
- If there's a form on the site that captures user information

If not, there is no need for one.

Do we need a privacy policy and cookies policy on our local WordPress website now that it will be used for information only?

Our web team have recommended the following:

For WordPress sites this depends on how it has been set up. Out of the box, WordPress doesn't set any cookies, but very few people use WordPress in its basic form. Once you start to install plugins on a WordPress site, you either need to check the plugins to ensure that they don't set cookies, or you need to implement a cookie consent function on the site. If you are unsure, the best option is to recommend you install a GDPR plugin to cover you, such as this: <https://wordpress.org/plugins/cookie-law-info/>

Privacy policies/terms of service are good practice for any website. There's a useful plugin for that too: <https://wordpress.org/plugins/auto-terms-of-service-and-privacy-policy/>

Financial questions

Do the additional services and support provided by the central Local Services Team mean that there will be cost implications for Branches / Sections / Groups / Divisions / Young Dentist Groups?

For the standard evening events and simple one-day events there are no additional costs involved for the services and support that we now provide. However, if an event is significantly larger or complex, eg: annual Branch Presidential Meetings, and you would like help with more of the event management process rather than just the standard bookings, promotion, attendance register, CPD certificate services we now provide, then we will respond to these requests on an event by event basis. If the event requires our wider event management service then a costed proposal may be discussed and put together for you.

How will we receive the income taken for our bookings?

Every Branch / Section / Group / Division / Young Dentist Group has a central deposit account set up by the BDA's finance team and the income from bookings for each event goes directly into these accounts. Once the event has taken place the money will be transferred to the locally held account of the Treasurer, assuming there is a working local account. If your area has no reserves in the locally held account, or you are a newly set up area, money received can be transferred before the event if required.

Can I collect cash payments for events in advance or on the day?

We request you do not take payment by cash for events. If a delegate turns up at an event without booking, please ask them to complete a booking form and we will follow up their booking and take payment after the event.

Marketing and promotion

How are local events / webinars promoted now?

All events and webinars receive one email a week for at least three weeks before the event via Dotdigital, the BDA's email and marketing system. Attendance numbers are monitored and if an event or webinar requires more promotion then further emails are sent out.

Full programmes for the year, flyers and information about all events may still be posted out at the cost of the local Branch / Section / Group / Division / Young Dentist Group.

We also use the 21 different Branch Facebook groups to promote events and webinars.

Who will be contacted about our events / webinars?

The law states that our contacts (BDA members, non-members and DCP / team member's records) must opt in to receive communications from us. Without their permission we cannot use their data. But we can promote your events or webinars to all of our contacts in your area.

The more people who come to all BDA events or webinars (central and local) and want to receive notice of national or locally held events, then the larger this list of opted in contacts will be.

Email marketing - what is Dotdigital?

Dotdigital is an email platform that allows us to design emails that fit our brand, deliver content to readers and learn from how they interact with it. Other types of system include MailChimp and Adestra – they're no better or worse – the BDA has chosen to use Dotdigital which is a safe and secure system that's integrated with our central database (CARE) and complies with GDPR.

Why do we have to use Dotdigital to send marketing emails?

Having the option to unsubscribe from emails within an email is critical, which is one of the reasons we use Dotdigital as our email platform. Recipients can manage their marketing preferences from a link from any email, which then automatically updates our central database.

Some member friends aren't getting our Branch/Section emails, why is this and what can be done about this?

Dotdigital suppresses emails when they've bounced (eg: if their inbox is full, is no longer in existence, or someone complains instead of unsubscribing). Each email platform has a reputation to uphold to maintain efficacy for their client list. They don't want bad email addresses on their system so they suppress them. It's easy to get someone's email unsuppressed – they just need to contact us at marketing@bda.org as we need their written permission to do this.

It may also be that someone isn't subscribed to receiving events related emails or their postal address can put them in another Branch or Section, so if you are concerned about someone not receiving emails, please let us know at branchsectionevents@bda.org we can check mailing permissions on our systems and contact the person concerned directly for their permission to update their preferences or area of interest if based in another Branch or Section.

Can I add PDFs to my event emails?

PDFs are not best practice as they take up a large amount of data to load. As over 50% of our recipients view emails on mobile, this will be a slow download and will eat up a lot of data, therefore frustrating the recipient. We try to avoid attaching PDFs wherever possible.

I don't think emailing members about our events or webinars is having enough impact. What can I do?

Depending on the event and who you are wishing to aim it at, it may be possible to expand the range of contacts included in the email marketing.

Additional emails will also be considered if we feel it could make a difference to the attendance numbers.

The marketing team creates the look and feel of the BDA's emails and they are happy to change the template as long as it sticks to brand guidelines. As marketers it's important we test new ideas to learn so we're happy to try something different when we send emails.

If you have the available budget, particularly for larger events, we also encourage postal mail outs to members to complement email marketing efforts. Sometimes you can't always rely on email marketing alone.

Pre-pandemic, the following "formula" was used for our centrally-organised seminars which have capacity for over 80 delegates:

- Email: Early bird date alert ("save money by booking before")
- Mail: Early bird date alert ("save money by booking before")
- Email: Last chance for early bird ("last chance to save money")
- Mail: Reminder
- Email: Last chance to book

This proved quite beneficial for us. The average opener rate on member emails is 30% and the click-to-open rate is 4%. Although we can't currently track how many event bookings are done via an email, the Events team see a rise in phone calls and bookings once an email or mail piece lands.

If your budget extends to some print mailing, particularly for one-day events or at the beginning of the year when you have the full programme to announce, then we would recommend you do that too.

When should the Staying in touch form be used?

The Staying in touch form is primarily aimed at non-members who attend events and may wish to be added to our event mailing list. Or alternatively for anyone who wants to make a change to the contact details or data permissions the BDA holds for them.

It would be great if you could take a small number along to local meetings and keep them on the registration desk for anyone who needs one.

Post event administration / data storage

How do I send data securely to the Local Services Team at head office?

Please scan and email branchsectionevents@bda.org any documents which contain personal data. The file should be password protected and the password sent via a second email.

What should I do with future and previous attendance registers for events?

Future attendance registers should be scanned and securely emailed to us, preferably as a PDF to branchsectionevents@bda.org This should be done as soon as possible after the event. Once you have sent us the register and we have confirmed receipt, please destroy your copy in a secure manner.

Previous attendance registers up to 10 years old should be forwarded to us as records of attendance need to be kept for up to 10 years' in line with the GDC's requirements. If you have registers that are older than 10 years, then these may be securely disposed of / shredded / or sent to us clearly marked for disposal.

What should I do with previous copies of registration forms for events?

Once an event has taken place, historic registration forms do not need to be kept and can be securely disposed of.

What should I do with previous CPD certificate templates or copies of CPD certificates with names on them?

If you have mail merged copies of CPD certificates for all attendees of an event, then you can forward these on to us and we will store these for 10 years in case there are requests for replacement CPD certificates.

Going forwards we will use a generic template for all Branch / Section / Group / Division / Young Dentist Group events which is compliant with the GDC's CPD requirements. But if you could forward us any previous CPD certificate templates you have, to make it easier for us to provide replacement certificates for those who ask, that would be helpful.

How will CPD certificates be managed and distributed in the future?

We will use the attendance register that you provide us with after a face-to-face event has taken place to mark who attended on our database. Those that attended the event will then receive an email with instructions on how to download their certificate from our online CPD portal.

For webinars, we are able to track who attended via the webinar software that we use. Those who attended the webinar for 75% or more of the total webinar time will receive the CPD and will be sent an email with instructions on how to download their certificate from our online CPD portal.

The CPD portal stores CPD certificates for all events and webinars that they have attended with the BDA for up to 10 years. Delegates are able to download replacement copies of their certificates whenever they wish.

What should I do with previous evaluation forms?

Ideally, all evaluation forms should be anonymous, no names, GDC/BDA numbers, so that any data captured is not recognisable personal data.

If your previous evaluation forms are anonymous, then these can be kept for as long as they are useful to you, as often they will inform your planning for future events. Best practice would be to create a report summarising the evaluation forms so that you have all the information and feedback from each event all in one place, and then you could dispose of the hard copy evaluation forms.

If your evaluation forms contain personal data, ie: names, GDC/BDA numbers or any other identifying data, then they should be securely disposed of / shredded. If the events are recent, you may find it useful to summarise the information into a report before disposal.








How will evaluation or feedback forms be managed in the future?

For face-to-face events, a feedback form will be created on SmartSurvey and a link sent out to all delegates in advance. The link will also be sent to the event organiser to display on the day/night and we will also send the link out again to attendees post event to remind them to complete the feedback in order to get their CPD certificate.

For webinars held on GoToWebinar, a feedback form is automatically launched at the end of the webinar and also in a reminder email one hour after the webinars scheduled end time. For webinars held on Zoom, a SmartSurvey link is sent out by email post webinar.

Contacts

The Local Services Team is comprised of:

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Please use branchsectionevents@bda.org to contact us wherever possible,
as this email reaches all of us.

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