

Imago Relationships International

Procedure 4.5

Managing and Sharing Contact Names

Accepted by Board at Mar 1, 2006 meeting. Web privacy policy added 3 March

1. Overview

Imago Relationship International gathers contact names from a number of sources and stores them in a database.

This procedure is to ensure that these contacts are treated respectfully, in a way that protects the privacy of the contacts themselves. It also ensures that we respect the sources of these contact names, and don't pass on information about contacts in a way which is inappropriate.

The procedure also ensures that the contacts are used in a way which maximizes their value to the organization.

2. Sources of Contact names

This procedure considers the following sources of contact names:

A: Direct

- IRI website visitors and phone calls to the office
- Visitors to IRI booths at conferences
- People who order Imago products
- Registrants for IRI programs

B: Indirect

- Workshop attendees provided by workshop presenters
- Subscribers to Imago newsletters provided by therapists

3. Previous practices

It has been common practice for Therapists to call the Imago office and ask for contact names of people from their area who had enquired recently. The office has been providing those names for several years. Recently we had some complaints about the way those names were used. Few names are currently collected since most people use the internet for referrals. As we become more proficient at collecting names from the internet we will again have to address the issue of sharing names.

4. Good practices

IRI will make sure that all processes comply with the following principles:

- No name provided by one workshop presenter or therapist will be given to another
- No name provided under one set of understanding will be used for another purpose
- It is assumed that unless the contact was specifically told to the contrary, if they give their details to IRI, they will not be passed on to a third-party such as an IRI member.
- It is recognized that if IRI collects names in a region and then gives them out to several members in that region, that person may receive an unreasonable amount of IRI mail which will be counter-productive for all
- IRI will respond promptly and effectively to all requests for information
- IRI will protect the database and ensure that it is not obtained by any third-party under conditions which permit it to be used
- IRI will display a privacy policy on its website which is consistent with state-of-the-art policies used in e-commerce

5. Use of contact names to support members

IRI places a high priority on collecting email addresses and other contact details from people interested in Imago programs, and making sure that they receive timely information.

Promotional activities to support members will include:

- Creating and distributing a monthly email newsletter to all relevant contacts in the database
- Working with regional groups to coordinate mailings or email campaigns promoting Imago therapists and their programs in that region. Printing and mailing costs will be paid by the region concerned, but the mailing will be controlled by IRI

IRI will not pass the list on to the regional group, or to any individual, or do any mailing to the list on behalf of one individual that is not coordinated with the IRI regional group.

6. Workshop Attendees

Workshop attendees frequently complete forms asking to be placed on IRI's mailing list, and also requesting additional information.

Workshop presenters are requested to pass this information on to IRI, so that the request can be fulfilled.

IRI will add these contacts to the general contact database and keep them informed of IRI programs, following the procedures outlined above to protect the names.

Workshop presenters are encouraged to make sure that as many workshop attendees as possible sign-up for the IRI mailing list. In this way we can keep them fully informed of programs, which will encourage them to refer friends, and also take additional programs such as advanced workshops, follow-up groups and therapy.

7. Imago Couples International

IRI will use the contact database to support Imago Couples International by sending out communications on their behalf at reasonable periods. IRI will not pass the list to Imago Couples International.

8. Segmentation of the Database

The database will be segmented so that we can easily identify the main categories of contacts, and target mailing accordingly. These categories will include:

- Professionals
- Public interested in programs
- Public who have attended workshops
- Members
- Trainees

Care will be taken to ensure that mailings are sent only to the appropriate group for that material

9. Oversight

The Board will appoint a Communications and Marketing Chair to oversee the implementation of the policy, including the quality, frequency and appropriateness of mailings. In the absence of this Chair, the role will pass to the Executive Committee.

10. Strategic Partnerships

IRI will identify appropriate strategic partnerships where a cross-mailing can be executed. This would involve emailing imago information for free to the partner's list, and information about the partner to Imago's list, in an appropriate way.

All such partnerships and mailings will only be completed with express permission and supervision by the Executive Committee

11. Internal Procedure for managing information from Workshop attendees

Workshop attendees are requested to return two documents from each workshop attendee, if they are completed by them:

1. Evaluation sheet – p91
2. Request for more information from Imago Relationships International - p93

These sheets may be mailed to Imago Relationships International, 160 Broadway, Suite 1001, East Building, New York, NY, 1001

Imago Relationships International will manage the information contained in them in a way which is consistent with the previous sections about privacy and confidentiality.

The information shall be used as follows:

1. Evaluation sheets

- a) The overall evaluation scores of the workshop will be kept, and monthly totals will be published on the website as an encouragement for couples to join, and to show our commitment to quality
- b) The factors in Part II will be collected and used as a basis for further improvements to the materials
- c) Additional comments for quote or publicity (on the workshop) will be used in a “What people said about us this month” on the website – to keep testimonial information fresh and valid. We will also keep a library of quotes.
- d) Other information about the individual presenter is for the workshop presenter’s own use. There are no plans for IRI to use this information

2. Request for more information

Imago Relationships International has a standard response form which mirrors the request for information on page 93. We will enroll people who request this

into the list for the monthly email newsletter, and respond by mail within 2 weeks of receiving the request for information.

12. Privacy Policy

Privacy Policy Statement

This is the web site of **Imago Relationships International**.

Our postal address is

**160 Broadway, East Building, Suite 1001
New York, NY 10038**

We can be reached via e-mail at info@imagorelationships.org
or you can reach us by telephone at (212) 240-7433

For each visitor to our Web page, our Web server does not automatically recognize information regarding the domain or e-mail address, however does recognize the individual IP address.

We collect the e-mail addresses of those who post messages to our bulletin board, the e-mail addresses of those who communicate with us via e-mail, the e-mail addresses of those who make postings to our chat areas, and the e-mail addresses of those who subscribe to our newsletters. In addition, we collect aggregate information on what pages consumers' access or visit, information volunteered by the consumer, such as survey information and/or site registrations.

The information we collect is used to improve the content of our Web page, used to notify consumers about updates to our Web site, and used by us to contact consumers for marketing purposes.

With respect to cookies: We use cookies to store visitors preferences, record session information, such as items that consumers add to their shopping cart, record past activity at a site in order to provide better service when visitors return to our site, and customize Web page content based on visitors' browser type or other information that the visitor sends.

If you do not want to receive e-mail from us in the future, please let us know by sending us an e-mail at the above address, calling us at the above telephone number, or writing to us at the above address.

From time to time, we make the e-mail addresses of those who access our site available to other reputable organizations affiliated with Imago Relationships International, whose products or services we think you might find interesting. If you do not want us to share your e-mail address with other companies or organizations, please let us know by calling us at the number provided above, e-mailing us at the above address, or writing to us at the above address.

From time to time, we make our *customer* e-mail list available to other reputable organizations affiliated with Imago Relationships International, whose products or services we think you might find interesting. If you do not want us to share your e-mail address with other companies or organizations, please let us know by calling us at the number provided above, e-mailing us at the above address, or writing to us at the above address.

If you supply us with your postal address on-line you may receive periodic mailings from us with information on new products and services or upcoming events. If you do not wish to receive such mailings, please let us know by calling us at the number provided above, e-mailing us at the above address, or writing to us at the above address.

You may receive mailings from other reputable companies, affiliated with Imago Relationships International. You can, however, have your name put on our do-not-share list by calling us at the number provided above, e-mailing us at the above address, and writing to us at the above address. Please provide us with your exact name and address. We will be sure your name is removed from the list we share with other organizations.

Persons who supply us with their telephone numbers on-line may receive telephone contact from us with information regarding new products and services or upcoming events. If you do not wish to receive such telephone calls, please let us know by sending us e-mail at the above address, calling us at the above telephone number, or writing to us at the above address. Please provide us with your name and phone number. We will be sure your name is removed from the list we share with other organizations

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Customers may prevent their information from being used for purposes other than those for which it was originally collected by e-mailing us at the above address or writing us at the above address.

Upon request we provide site visitors with access to a description of information that we maintain about them. Consumers can access this information by e-mail us at the above address or writing to us at the above address.

Upon request we offer visitors the ability to have inaccuracies corrected in contact information. Consumers can have this information corrected by sending us e-mail at the above address, calling us at the above telephone number, or writing to us at the above address.

With respect to security: When we transfer and receive certain types of sensitive information such as financial or health information, we redirect visitors to a secure server. Financial information is encrypted and processed at the time of use, but it not stored in any form on our server.

If you feel that this site is not following its stated information policy, you may contact us at the above addresses or phone number.

