

Situation Statement:

Current UUFSCO policies only address information access in one aspect, which is a statement on access to and intended uses of the UUFSCO directory. This policy is framed around access to printed copies of directories that contain contact information for members, and to another directory which also contains contact information on “contributing friends.”

There is no reference to the sort of information that we currently share on our web site, no definition of criteria or permissions sought for “contributing friends,” no mention of who has access to which financial information, and no mention of guidelines for electronic access to information about our members or their activities within the church. As we plan for the rollout of an online church management software solution, it is important that we agree upon and document our policies for use of and access to this information.

CURRENT POLICY ON UUFSCO DIRECTORY <2014 policy >

Active members and contributing friends will receive at least one copy of the Fellowship Directory free each year. The Membership Committee will determine additional distributions.

The Directory is intended for personal use only. Any use of the Directory for commercial purposes or by any organization other than the Unitarian Universalist Fellowship of Central Oregon is prohibited. This disclaimer is to be published in the front of every edition of the Directory.

As a general rule, neither the Fellowship Directory nor the mailing list will be provided to anyone outside of the denomination. Only the Board can override this rule should such a request for use be made.

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PROPOSED UUFSCO INFORMATION ACCESS POLICY:

A. Definitions:

1. "**Members**" are individuals who have been admitted to the Fellowship as defined under the UUFSCO Bylaws.
2. "**Friends**" shall be understood as non-Members who have consented to sharing their personal information with lay leaders in accordance with this policy. <Typically such people will have a high current level of involvement in the life of the church, but the judgement shall be made by the participant via an opt-in process, with an opt-out option also available if a “friend” wishes to stop sharing their personal information with UUFSCO lay leaders.>
3. "**Personal information**" shall be understood to include, but not be limited to: electronic or printed materials containing identifying information about those who participate in the activities of UUFSCO, where “identifying information” is any combination of name, photo, address or email where a person could be uniquely identified or contacted. <Examples of places with UUFSCO personal information are: Members area of the website, Directory, Church management software.>

4. “**Financial information**” shall be understood to include, but not be limited to: electronic or printed materials that describe pledges or contributions to UUFECO or affiliated groups.

B. Policy:

1. Policy on control of and access to personal and financial information of UUFECO Members and non-Members is a responsibility of the Board. All such information is to be treated as “for personal use or for uses of the official activities of UUFECO only,” and designated as such.

2. As a general rule, none of the personal or financial information about UUFECO Members or non-Members will be provided to anyone outside of UUFECO. Only the Board can override this rule should such a request for use be made. Any individual found to be abusing his or her information access privileges may have them revoked, and people who are administering sites where information is provided may temporarily reduce access if issues are discovered.

3. In general, there will be greatest information access for people who are most actively involved in UUFECO, and least information access for those who are least actively a part of UUFECO.

C. Levels of access:

1. **Non-Members** have no access to personal or financial information about UUFECO Members but are limited to information maintained on UUFECO's public website or displayed in UUFECO's public areas.

2. **Members** can see personal information on Members, church calendar, and public church business such as board minutes and church policy documents. Members may also see their own pledge and contribution information, as well as the UUFECO annual budget and pledge drive totals.

3. Members who **are Committee Chairs, team leads or Board members** may also see personal information on all Members and Friends. Other members may be granted access to this level of access by approval of the board.

4. Staff may allow Members temporary permissions to edit other's personal information **if Members are volunteering to help Staff update personal records**. Such expanded permissions should be communicated by staff to the board and the minister. These Members would have only the access to financial information given them as Members.

5. **Staff** may be granted permission to view and edit personal information of any people connected with UUFECO, as appropriate for their job responsibilities. Staff may be able to see who has pledged, and who is current with pledges, as appropriate for their job responsibilities.

6. The **Minister** may see all personal information. The Minister may also see individual pledge and contribution records, unless an individual specifically requests that their gift or pledge NOT be viewable by the minister. The minister will be able to see who has pledged, and who is current with their pledge responsibilities.

7. **System Administrators** of the UUFECO website and online church management system software have access for viewing and editing purposes to all personal and financial information contained within the systems that they administer. Agreements should be signed by all System Administrators to ensure ethical use of this information.

8. The **Stewardship Chair** will have access to information whether any Member or non-Member has pledged or contributed to UUFCO, and to the aggregate of all pledges and contributions, but will not have access to information about the amount of any individual pledge or contribution.

9. The **Bookkeeper and the Treasurer** each has a right to see and edit all Individual pledge and contribution records. Personal information access is the same as committee chairs.