

# **Unitarian Church of Calgary Privacy Policy – Final Version – Revised Oct 7, 2009**

At the Unitarian Church of Calgary, we keep personal data so that we may conduct our shared ministry effectively and respectfully. In the following sections we describe the types of data we collect, why we need the data, how we store the data, and how we protect it.

## **General Personal Data**

We collect General Personal Data so that we may carry on the operations of the church. For example, we

- create a directory of contact information for members, friends and their children
- create listings of voting members for general meetings
- create class lists for Religious Education classes, which for safety include allergies
- create mailing labels for church newsletters and other mailings
- maintain an email list for recipients of email bulletins and the Quest by email
- record the dates when individuals passed police checks, as they need to be re-checked periodically

General Personal Data includes name and address data, children's birthdates and allergies, membership status, photographs, emergency contact data, committee membership, activities, skills, and other such information relating to families and family members in our congregation.

General Personal Data is shared outside the congregation when church members' name and address information is passed on to the Canadian Unitarian Council (CUC) for its operations. The CUC does not share this information with outside bodies.

To protect the privacy of our members and friends, General Personal Data is not published on the church's website unless contact information is referenced in the Quest (with permission).

People can confirm their General Personal Data, and can specify that certain parts of their data not be published in the Church Directory. Only contact information is published in the directory. Other information, such as ages and medical information, is used only by staff and committee members who have a need to see it. The Directory is published only on paper, not electronically, and is made available only to staff, members and friends.

This data is stored in the Church Information Management System, which uses PowerChurch software. The Administration committee implements decisions on who can access General Personal Data – the list may be seen in Appendix A of this policy. We use the access control system, with password protection, within PowerChurch to ensure that only people who have been authorized to read and change this data are allowed to do so. The relevant Committee chair decides who can access the data.

## Personal Financial Data

We keep Personal Financial Data so that we may manage the finances of the church. For example, we

- collect and maintain information on pledges, for budgeting
- collect and maintain information on donations, to create charitable donations receipts
- send letters to pledgers showing the donations they have made against their pledges
- retain information about donors' bank accounts, for preauthorized payment of donations

Access to this information is tightly controlled, because of its sensitivity.

This data is stored on paper and in the Church Information Management System, which uses PowerChurch software. We use the access control system within PowerChurch to ensure that only people with a need to know, and who have been authorized to read and change this data, are allowed to do so.

Pledge data is collected by the canvass committee and worked on by them during the canvass. When the canvass is complete, pledge data is entered into PowerChurch. The chair of the canvass committee decides who will have access to pledge data, basing the decision on need to know.

Paper documents containing Personal Financial Data are stored in the Treasurer's locked storage at the church.

The Administration committee implements decisions on who can access Personal Financial Data (both in electronic form and in locked storage) – the list may be seen in Appendix A of this policy.

## Confidential Personal Data

We keep Confidential Personal Data so that we may manage our staff and protect our congregation. For example, we

- maintain staff appraisal data
- record people, if any, who have NOT passed police checks

Confidential Personal Data is kept only on paper, in locked storage.

## Minister's Files

The Minister keeps notes and other information regarding congregants and staff in his/her files. S/he is bound by professional standards to protect this information, but the present policy does not address this information.

## Appendix A (minor revisions November 2016)

At the date of issuance of this policy, here are the lists of positions having access to General Personal Data and Personal financial Data. Current lists can be obtained from the Administration Committee.

The following positions have access to **General Personal Data**

	<b>Position</b>	<b>Access</b>
<b>Administration</b>		
	Administrator	Read, change
	Treasurer	Read, change
	Receiver	Read, change
	Accountant	Read, change
	Bookkeeper	Read
	System administrator	Full access to CIMS
	System administrator	Full access to CIMS
CC	Caring Community Committee	Read
Membership	Membership Committee	Read, change
Stewardship	Stewardship Committee	Read, change
Minister	Minister	Read, change
Others	Members and Friends of the church	Paper directories only
RE	Director of Religious Education	Read, change
RE	Youth coordinator	Read, change

The following positions have access to **Personal Financial Data**

<b>Position</b>	<b>Access</b>
Treasurer	Read, change
Receiver	Read, change
Accountant	Read, change
Bookkeeper	Read, change
Administrator	Paper for transfer to locked storage
Stewardship Committee	Pledge data during collection
System administrator	Full access to CIMS
System administrator	Full access to CIMS