**Unitarian Universalist Congregation of Fairfax**

**Operational Policy**

**Subject: Collection and Use of Personal Information Number: I. A.**

**Effective Date: August 17, 2010 Approved By: Coordinating Team**

**Revised: February 15, 2017**

**Policy**

UUCF may collect, retain, and use personal information concerning its members, friends, and others (“congregants”) who participate in its programs and activities in accordance with the procedures set forth below. The confidentiality of that information shall be respected by all UUCF staff members and volunteers in accordance with the procedures outlined below. UUCF members and friends who have access to UUCF’s member database are not permitted to redistribute this information in any format.

**Procedures**

Information That UUCF Keeps

1. UUCF maintains databases that contain the following types of personal information: Names, addresses, telephone numbers, email addresses, family and household relationships, occupations, interests as reported by the individual, UUCF activities, children’s allergies, pledges, pledge payments and other contributions.
2. This information is updated regularly. Congregants may update or correct their information through the website directory or by contacting the Member Services Coordinator or Education Assistant.
3. These databases may be accessed by UUCF staff for the following purposes:
   1. Maintaining records identifying congregants;
   2. Tracking pledges of financial support and payment of those pledges;
   3. Tracking other financial contributions;
   4. Communicating with congregants;
   5. Matching congregants’ interests and skills with volunteer needs or available programs;
   6. Reporting on UUCF programs and activities;
   7. Maintaining class and volunteer lists related to Religious Exploration;
   8. Other purposes directly related to UUCF community life or activities.
4. UUCF will maintain mail and email lists that will be used for communications from UUCF to congregants concerning UUCF programs and activities. These lists will not be made available to outside parties (non-congregants) except with the prior approval of the Coordinating Team (CT).
5. UUCF members and friends are prohibited from using postal or email addresses gained from the UUCF database or from emails sent by UUCF staff to engage in solicitations, discussions, political organizing or other activities not related to UUCF activities.

Use of Information

1. Personal and financial information shall not be disclosed by UUCF except in accordance with this policy. Staff members are required to adhere to the confidentiality policy contained in the Personnel Manual.
2. Unless otherwise required by law or regulation, or as provided in this policy, congregants’ personal information shall be used only in carrying out UUCF programs and activities. It may be disclosed to the Unitarian Universalist Association and its affiliated or component organizations as necessary for UUCF or members’ participation in UUA activities.
3. Information on congregants’ interests, occupations, or household relationships may be shared with congregational leaders who request such information from the Membership Services Coordinator to fulfill the need for future leaders/volunteers.
4. Information on congregants’ contact information, interests, occupations, allergies, or household relationships may be shared with congregational volunteers to fulfill the needs of the Religious Exploration Program.
5. UUCF will take reasonable steps to safeguard the confidentiality of all personal information that it maintains in written or electronic form. All personal financial information is kept in a locked safe and the electronic database is password protected.

Financial Information

1. Pledge and payment information will be accessed only by authorized staff and designated volunteers, who will be required to sign a confidentiality agreement (see agreement below). The Director of Administration is responsible to designate who may access information and to ensure that confidentiality is maintained.
2. Payments may be made by cash, check, electronic transfer, credit card or stock transfer. Congregants will enter account information directly in a secure website through a UUCF website link to set up electronic transfers or credit card payments. UUCF staff will not have access to congregant bank account or credit card information.
3. Changes to pledges or contribution records maintained by UUCF or questions about financial transactions should be directed to Director of Administration.

UUCF Directory

1. UUCF relies on a web based directory that is tied to the UUCF database and is available to congregants on their electronic devices through a secure login.
2. From time to time UUCF may release a printed photo directory. Congregants’ (and their immediate family members’) names, addresses, telephone numbers, and email addresses will be included in the directory unless they ask the Member Services Coordinator not to publish that information.
3. The directory will be made available to congregants but will not be sold or made available by UUCF for any non-UUCF commercial or fundraising purpose.

Newsletter, Announcements and Website

1. Congregants’ names and contact information may be included in the UUCF newsletter, printed or electronic announcements, or on the UUCF website in connection with the publication of information on UUCF programs or activities unless they request otherwise.
2. Photographs may be taken at UUCF events for use in UUCF publications and the website. Prior consent will be obtained for the use of photographs of minors.

Volunteer Confidentiality Agreement

Unitarian Universalist Congregation of Fairfax

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, hereby acknowledge that I have received a copy of the UUCF policy on collection and use of personal information. I understand that it is my responsibility to abide by that policy and otherwise to safeguard the confidentiality of any information about UUCF members, friends, or staff members to which I have access as a result of my activities at UUCF. I will not release, copy, transmit or use any such information outside the scope of the UUCF activity in connection with which I received access to the information.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Volunteer Name (Print)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Volunteer Signature