



NEW ENGLAND  
YEARLY MEETING  
OF FRIENDS  
QUAKERS

## A Covenant of Trust:

*How We Steward Your Data and Protect Your Privacy*

### Purpose: Why Data?

New England Yearly Meeting of Friends (NEYM) collects, maintains, and uses data, including contact information, financial information, health data, and records of relationships and activities, to support and strengthen the Quaker movement, both in New England and beyond.

### Data Collection

Data comes to us from a number of sources, including:

- Through direct requests and sharing from you, including requests to stay informed about the life and ministry of New England Quakers;
- Through reports from in-person interactions with staff and other Friends serving on behalf of New England Quakers, including attending worship or other events at local meetings;
- Through your participation in events sponsored by New England Yearly Meeting of Friends, including Annual Sessions, Living Faith gatherings, Youth Ministries retreats, spiritual nurture workshops, and more;
- At your local meeting's discretion, through sharing your meeting's membership lists, nominating slates/service roster, and contact information for people active in the meeting;
- Through publicly available or widely shared information about Friends activities in local meetings affiliated with NEYM, and in the wider world;
- From other Friends organizations with which New England Yearly Meeting is affiliated, and with which we partner in specific ministries.

### Data Access

We recognize that Friends and Friends meetings' decision to share data is founded on a precious trust placed in us as we serve our faith communities, and we make every effort to sustain that trust. Access to data is only given to those who need access to the data in order to carry out their responsibilities in serving Friends. When it is unclear whether sharing your data is appropriate for these purposes, we will err on the side of confidentiality and will ask for your explicit permission to share your data.

Specifically:

**Development.** Overall access to giving information is limited to the Accounts Manager (for financial operations), Office Manager (as system administrator for the database), and the Yearly Meeting Secretary. The Treasurer and Clerk of Development will have access to giving information on an as-needed basis in order to carry out their responsibilities. Under some circumstances, to support the fundraising goals of the Yearly Meeting, limited giving data about a particular household's giving may be shared with a trusted consultant or Friend serving in a leadership role, who would use that data only to support the development work of the Yearly Meeting.

Giving information shared in reports to the Development Committee, Permanent Board and other audiences is anonymized to protect the confidentiality of individuals, unless you have specifically given permission for your giving information to be shared more publicly (for example, to acknowledge and celebrate your family's generous gift).

A small number of fundraising-related appeal messages per year will be sent to our general mailing list—one to paper and ~2 to our electronic list. If you don't want to receive any fundraising communications, please let us know by emailing [office@neym.org](mailto:office@neym.org).

**Health information.** Health records will be kept strictly confidential and secure (both in electronic and paper formats), and shared only as needed to ensure the health and safety of participants in Yearly Meeting programs (including Youth Ministries retreats and Annual Sessions). Access will be restricted to the staff program coordinator (Young Friends Coordinator, Junior Yearly Meeting/Junior High Yearly Meeting Coordinator) and (in the absence of direct coordination by staff, such as during the Junior Yearly Meeting program at Annual Sessions) to the trusted volunteer or stipended coordinator supervised by a staff member. In an emergency, the Yearly Meeting Secretary or System Administrator may also access health records, but will not regularly review them unless there is a specific need or concern.

Health information will be collected either securely online (using a custom-built Salesforce implementation in the case of online registration for Annual Sessions) or in print form directly from parents or guardians, or from individuals themselves.

Wherever possible, unless previous consent is given, we will only share relevant health information that needs to be more widely known with adult program volunteers in *general terms*, for example, "there is a peanut allergy in the group" rather than "Jose has a peanut allergy." The staff program coordinators welcome confidential conversations with parents and youth about how we can most responsibly and respectfully approach especially sensitive health information in the interest of all involved.

**Criminal Background Screenings.** NEYM provides criminal background screenings for youth workers as a service to local and quarterly meetings, and in support of the NEYM Youth Ministries programs. This is a key element of our commitment to child safety. The NEYM Office Manager maintains a list of individuals who have been successfully screened to work with youth; the records of individual screenings which include confidential information are kept in a locked cabinet accessible only to the Yearly Meeting Secretary. When screenings are conducted and those screened pass the screening, those on whose behalf the screening was conducted (local meetings, youth program coordinators) are informed that the screening has been passed. In the event that someone does not pass a screening, the person who did not pass the screening will be contacted to inform them of this, and to give them the opportunity to communicate with the requesting group (e.g., local meeting, quarterly meeting). In all cases, the requesting party will be informed that a screening was not successful, either by the person who was screened, or by the Yearly Meeting Secretary. Further detail will not be shared with the requesting party, unless it is the judgement of the Secretary that withholding such information would endanger someone involved. A record for anyone not passing a screening will be securely retained by the Yearly Meeting, but will not be listed on the active list of screened persons in any way.

**Pastoral Care.** At times, staff and volunteers charged with caring for the spiritual life of New England Friends may need to keep records of tender, sensitive, or confidential conversations or information related to individuals, families, or meetings. When these notes are kept, they will be maintained securely in the NEYM database or other password-restricted format, and shared only on a need-to-know basis. In the case of paper documents, they will be kept in a locked filing cabinet. Electronic communications related to these concerns will use initials rather than full names to designate people whenever possible.

**Archives.** Data and records will be maintained and shared with the NEYM Archives according to the NEYM Records Retention and Destruction Policy (in process as of 2/2019), and with relevant archival procedures as recommended by the NEYM Archives and Historical Records Committee and UMass Special Collections and the University Archives (SCUA), and approved by Permanent Board.

### Data Storage

Wherever data is kept, we commit to maintaining rigorous standards of security to protect your privacy and be worthy of your trust.

We maintain an integrated database built on the Salesforce platform, which is the central repository for personal data for the Yearly Meeting. This system is cloud-based, and the integrity and secure storage of the data is the responsibility of Salesforce, a globally recognized company committed to continuous improvement in industry-standard encryption and best practices. Salesforce is committed to the European-based GDPR

standard of privacy compliance, which is stronger than the current US-based standards, and NEYM aspires to these standards as well.

We will keep up to date with improvements to security practices, and ensure that our database is up to date with appropriate, industry-standard security.

Financial data is also maintained in QuickBooks online, and some additional information (such as records of event participation) is also kept in NEYM's Google Drive file management system, where access is managed based on what each individual needs to see. These files are available only to roles [e.g., NEYM Treasurer, committee clerks] who are specifically granted access. We also keep some data temporarily in other software we use for specific, limited purposes (like *Eventbrite* for smaller-scale event registration).

For online/electronic financial transactions, including credit card donations and online purchases, NEYM uses a high-security process called tokenization which means that at no point are credit card numbers actually stored in the NEYM database. We are committed to maintaining professional financial processing standards and ensuring Payment Card Industry Data Security Standard compliance. When credit or debit transactions are processed at events (including event registration, bookstores, and on-site donations), we use a separate, secure (password-protected) network to do so. This is done either by using a mobile data plan, a secure wi-fi network separate from one that allows wider access, or a mobile wi-fi hotspot with its own distinct password.

### Use of Data

We will use your data to support and strengthen the Quaker movement in New England. This may include sharing communications, including but not limited to: news, events, resources for youth and families, for Friends active in public ministry and witness, for Friends serving in clerking and other leadership roles in local meetings, stories of Quaker ministry and witness, invitations to serve and financially support Friends' shared ministries, and similar uses directly related to the ministry and witness of Friends in New England.

If you participate in an activity sponsored by New England Yearly Meeting of Friends (Annual Sessions, Living Faith, spiritual formation workshop, youth retreat), we will add you to the general print mailing list for New England Yearly Meeting of Friends, and to the monthly email newsletter. We make every effort to carefully steward these largest channels of communication to avoid overloading Friends with information while helping include and share the most important and useful news and opportunities. We welcome your feedback and suggestions on how we can learn and improve.

All mass email communications (newsletters and email blasts) will include the option to unsubscribe and to change preferences, as well as a description of why you are receiving a particular message. Requests to be removed will be honored as soon as possible; a record

of your preferences will be kept in the database to help us honor your request and to prevent you being added again in future without a specific request. As of January 2019, options that may be specified for email subscription include: Major Announcements, Monthly Email Newsletter, Outreach, Religious Education, and No Fundraising. In the database (for all communications) as of January 2019, preferences for restrictions include: no youth mailings, no fundraising, no USPS mail, no email, etc.

You can also adjust your communications and privacy preferences by contacting the Office Manager at [office@neym.org](mailto:office@neym.org), or at 508-754-6760.

If you are serving in a formal service role (clerk of monthly meeting, member of an NEYM committee, youth ministry volunteer), we presume that you give consent to be contacted in connection with your service in this role. We may contact you individually (to ask how things are going in your meeting's First Day School) or add you to lists sharing role-relevant content (like a periodic email sharing resources and ideas for First Day School teachers).

If for any reason you are serving in a formal service role and would prefer that a part of your contact information not be publicly available, the NEYM office can work with you to balance the need for privacy with the needs for other Friends to be able to contact you.

If we want to contact you about another specific activity related to the life and ministry of Friends for which you have not given your advance permission (for example, if you have attended a Living Faith event and we'd like to make sure your family knows about Youth Ministries retreats), we will explain how we got your contact information and why we're contacting you in the communication we send to you. We will always try to balance respecting your privacy with making sure you're aware of opportunities in your wider Quaker community that we think—and hope—you might find nourishing or life-giving.

### Sharing Data

We will share data consistent with the expressed wishes of the people the data is about. This includes individuals, families, and local meetings.

We do not share bulk (comprehensive) data with any other organizations or individuals.

We do not share information about youth under age 18 without their parents' consent, or contact youth without their parents' consent. We understand consent to participate in the Youth Ministries retreat programs to be consent for staff to contact youth participants about their participation. Yearly Meeting Junior Yearly Meeting and Junior High Yearly Meeting programs have a written job description for a "staff photographer" as well as a "photo and digital media policy," which are attached and incorporated by reference.

In some cases, we may share limited, criteria-specific, one-time information (such as a list of recorded ministers, or emails of local meeting clerks) with Friends organizations with which New England Yearly Meeting of Friends is affiliated (FWCC, FGC, FUM) in order to promote activities (for example, speaking tours, curriculum, or program opportunities) that might support and strengthen the Quaker movement in New England. Whenever reasonable and feasible, we will send news through NEYM-specific channels (for example, distributing news about an FUM service opportunity in Cuba Yearly Meeting through the NEYM email newsletter) rather than sharing contact information with FUM for FUM to email directly.

On request, we will share data NEYM maintains about local meetings with those local meetings themselves (for example, to help local meetings with reconciling and updating lists of members and attenders). This will not include any confidential information such as giving data without explicit permission from the donor/person whose data it is.

NEYM is committed to continuing to listen, both to Friends and to the Spirit, for ongoing guidance in how we serve as stewards of your data, and to continuously learn and improve. We welcome your wisdom, and are grateful for your trust and support as we go forward together.

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## JYM-JHYM Staff Photographer Job Description

- Photographs are taken at our retreats to preserve memories and to convey something of the essence of our community to others interested in learning more about JYM and JHYM. Thank you for sharing your gift of seeing with us!
- Please spend a few minutes reviewing our Photo Policy on the next page.
- Only you and young people who mentor with you are to take photos during retreats.
- No one is to take any videos.
- If there is any child or staffer who does not want their photo taken for the photo album or the online album, you will be given their names. Please speak with Gretchen if you have any questions.
- Though the content of the photo albums are ultimately the coordinator's responsibility, it will be helpful for you to honor and follow these specific requests of both young people and staffers.
  - No one sleeping.
  - No times when we are in worship or in small group circles.
  - Anything that might be embarrassing for the person photographed. When in doubt, don't be afraid to ask – this is a learning experience for all of us.
  - Bad hair moments, unless you are given permission!
- In addition to taking your own photographs, your role involves mentoring JH'ers who are interested in photography. They will seek you out! You will have the opportunity to oversee (shadow) their use of the camera and the images they take, helping them with the artistry as well as keeping to the same guidelines that you have. Hopefully you will find this to be an enjoyable role – you'll get to know some of our JH'ers in a unique way. We have some very talented artists!
- If you are using 'my' camera, you are encouraged to edit as you go along (so I don't have to do it afterwards)!

Thank you, dear Friend!

Gretchen Baker-Smith

## The JYM-JHYM photo and digital media policy

This policy was enacted after an extended period of discernment by the JHYM Community. It has been a very clear and successful commitment since being agreed to and implemented in December, 2011.

Our intentions in raising these issues were twofold. One, we want our beloved young people to be safe and savvy online, particularly on the social networking sites. Two, we want the integrity and spirit that covers our times in community to be celebrated, honored and preserved.

- Photographs are taken at our retreats to preserve memories and to convey something of the essence of our community to others interested in learning more about JYM and JHYM.
- We are aware that some photos could be misinterpreted by the wider world. Without context and first-hand experience, photos of us being silly or even peaceful, for example, could be wrongly judged. We love what happens in our community and don't want photography to negatively impact how we are with each other. We agree that there are particular times, particularly in worship or during small groups, when photo-taking would be a distraction to us being present to each other and the Spirit.
- One staffer is designated as the retreat photographer for the weekend. If other staffers wish to assist with this ministry, they need to check in with the retreat coordinator and the designated staff photographer. All photos taken, after editing, are to be given or sent to the coordinator.
- The staff photographer has a special sheet of instructions in their staff notebook.
- Digital Photo Viewers are maintained for the community's enjoyment. Many (but not all) of these same photos are also posted to our online photo album linked to our programs' websites.
- We never display the full names of children on our online photo album.
- We check in with the community at every retreat, to make sure we have a current list of children who do not wish to appear on-line. We also vigilantly honor parents' wishes regarding permission for their children to appear on-line.
- Occasionally our photos are sought for inclusion in other Friend's publications, in which case permission is sought from all photographed, and the parent/guardian, beforehand.
- What is posted on our website and put into our photo albums is ultimately the coordinator's responsibility. Parents and/or young people may request to omit their image(s) from any or all of our photo albums or sites. Contact the coordinator about specific photos or about our photo and media policy in general.

Gretchen Baker-Smith, Dec. 2014