



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 Committee 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 of 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 messages appeal 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.

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 person with responsibility for the health and safety of participants, or to trusted volunteers or stipended coordinators supervised by that staff person. Other staff may also access health records where there is a specific need or concern, but will not regularly review them.

Health information will be requested either electronically or in print form directly from parents or guardians, or from individuals themselves. *Best practices for electronically storing health information once it is received are under review as of April 2019.*

We will share relevant health information that needs to be more widely known on an as-needed basis. 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, care will be taken to share them only as, in our judgment, is needed to support the wellbeing of those involved, with special consideration of issues that might cause harm if they were more widely known. We recognize that in some situations NEYM staff and volunteers are required to abide by legal reporting requirements in situations of possible abuse or neglect. In all cases, staff or volunteers with questions regarding the appropriateness of sharing information should consult their supervisor or the coordinator of their program.

Care should be taken that ongoing communications related to pastoral care concerns use as little identifying information as necessary.

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 1/2019, 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 1/2019, 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, 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.

Except for purposes of program logistics (such as participant lists, carpool lists, etc.), we will not share information about youth under age 18 without their parents' consent, or contact youth without their parents' awareness.

We understand consent to participate in the Youth Ministries retreat programs to be consent for staff to contact youth participants about their participation and related activities (such as transportation). The 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 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.

Third-Party Applications and Providers

At times, NEYM will share data with third-party applications and providers (such as MailChimp, Salesforce, Eventbrite, or Google) for the purposes of using those applications to conduct the work of NEYM (such as sending email newsletters, maintaining the NEYM database, registering for events, or editing documents). This will be done only when the security and privacy policies of those providers are at least as rigorous as those reflected in this policy. NEYM will not sell or release ownership of data, and will regularly review current privacy concerns that could result in the need to re-evaluate our use of particular tools or platforms.

Response to Breach

In the event of a breach we will 1) seek to notify everyone whose information we believe was affected; 2) work with our insurer and relevant law enforcement; 3) review practice and policy in order to make changes that could prevent future breaches.

Cyber Liability Insurance

To the extent possible, NEYM will seek to maintain reasonable appropriate levels of coverage under a cyber liability insurance policy or provisions in existing insurance policies.

Learning and Revision Going Forward

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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Note regarding Friends Camp:

As of April 2019, a distinct set of policies is being created for the use of Friends Camp. Once this policy is created, it will be integrated with this policy to the extent that the operational needs of the different programs and contexts make this possible. For now, this policy governs the work of the NEYM Operating Division (all programs and organizational activities of New England Yearly Meeting of Friends except Friends Camp).