

## Stewardship Confidentiality Principles & Practices

Follen's Mission says, in part that we "give generously of our time, talents, and resources at Follen and beyond, energized by our contributions and grateful for those of others."

As part of Stewardship's role in support of Follen's Mission, all persons involved in Stewardship shall safeguard confidential stewardship information.

- We will grant access to the confidential stewardship information only to the extent that such information is needed to carry out our work.
- We will not disclose confidential stewardship information to anyone not authorized to have it, and we will be mindful to avoid discussing confidential stewardship information when we might be overheard.
- We will not indirectly disclose confidential stewardship information by disclosing information (such as pledging levels, e.g., "That person's a big donor") that permits an inference as to pledging levels as that is considered disclosure under this policy. This does not preclude a major donor event approved by the Stewardship Committee.
- Other than in a confidential Stewardship setting as necessary to our work, we will not audibly articulate our speculation, guesses or inferences about a person's giving capacity.
- We will train all Stewards in these Principles & Practices.
- Improper disclosure of confidential information may be grounds for removal from stewardship activities.
- If we obtain sensitive information in the course of stewardship activities that is important for the minister or the lay ministry to be aware of, we will communicate such information promptly ***if and only if*** the person involved has given permission to do so.

Confidential stewardship information is all personally identifiable financial data from church records and any sensitive information obtained in the course of stewardship activities where the person whose information it is has not explicitly authorized the disclosure of the information.