

**GENERAL COUNCIL ON FINANCE AND ADMINISTRATION
OF THE UNITED METHODIST CHURCH**

Section:
Policy #:
Adopted: 11/19/2010
Revised: 8/13/2020

GCFA Denominational Data Sharing

Policy

In accordance with ¶ 807.14 and ¶ 807.15 of the *2016 Book of Discipline*, the General Council on Finance and Administration is charged by the General Conference with collecting, processing, and distributing certain authoritative data on the people, entities, and ministries of the United Methodist Connection.

In accordance with the letter and spirit of ¶ 807.14 of the *2016 Book of Discipline*, access to some elements of personal and address/contact information shall be restricted as determined by this policy. In all cases, personal information shall only be distributed to authorized entities for the purposes of enhancing the mission and ministry of The United Methodist Church.

1. In the collection of data, GCFA is entrusted by the denomination to be a wise steward of the information it collects and keeps. This ministry carries with it tremendous responsibilities to ensure information is correct, current, complete, and that the privacy of individuals is protected. Data collection, storage, and distribution policies should reflect the denomination's current understanding of our shared connectional covenant. These policies should uphold the values of transparency and mutual accountability in balance with the need to protect the privacy of individual United Methodists.
2. All data storage and sharing policies shall conform with the laws and governmental regulations pertaining to the collection, storage, and distribution of personal data in the location where the individual resides.
3. GCFA's collection, processing, storage, and dissemination shall conform to the prevailing best practices for industry.
4. All entities and individuals shall have the right to review and correct all information processed by GCFA regarding the entity or individual.
5. Restrictions on data access shall be based upon five (5) data access categories, which are as follows:
 - a. Public - Data that can be readily accessed by anyone without restrictions or conditions. This includes the information necessary for conducting the business of the connectional Church and informing the public of its mission and ministries, such as:

- i. Addresses for the offices of general agencies, bishops, annual conferences, and districts, as well as United Methodist related schools, colleges, universities, hospitals, and homes will be available on an individual, entity-by-entity basis.
 - ii. Business addresses and other contact information for leaders of the denomination including bishops, general agency staff, conference staff, district superintendents, members of the boards of directors of the general agencies and the Connectional Table, and persons and entities not included in the above list will be available on an individual, entity-by-entity basis.
 - iii. The totals, trends, and analysis of statistics collected on Tables 1-3 for local churches as can be accessed on an individual, church-by-church basis.
 - iv. The mailing addresses and physical location of local churches as can be accessed one church at a time.
 - v. The totals, trends, and analysis of statistics collected on Tables 1-3, aggregated by district, conference, episcopal area, or jurisdictional or central conference.
 - vi. The appointments of the clergy, including the statistical trends of churches during their assignment to that appointment.
 - vii. The public findings of research projects conducted by GCFA.
- b. Limited Access - Data that can be accessed by select individuals and entities with some conditions on their use. This information includes:
- i. Consolidated files of addresses for the offices of general agencies, bishops, annual conferences, and districts, as well as United Methodist related schools, colleges, universities, hospitals, and homes.
 - ii. Consolidated files of business addresses and other contact information for leaders of the denomination including bishops, general agency staff, conference staff, district superintendents, members of the boards of directors of the general agencies and the Connectional Table, and persons and entities not included in the above list who are normally listed.
 - iii. Consolidated files of statistics of local churches, as collected on Membership and Participation (Table 1).
 - iv. De-identified datasets derived from original survey-based research, so long as the distribution of the data does not violate any previously established agreements or covenants made between GCF A and the respondents or data providers.

- c. Restricted - Data that can be accessed by a select group of individuals and entities for specific, limited purposes based upon a formal review and approval process by GCFA staff. This information includes:
 - i. Consolidated files of mailing addresses, e-mail addresses, and physical locations for local churches
 - ii. De-identified consolidated datasets of clergy including basic demographics like, age and race. Data must be sufficiently cleansed to ensure information contained in the dataset cannot be used to identify individuals.
 - iii. Consolidated files of statistics of local churches, as collected on Membership and Participation (Table 1), Church Assets and Expenses (Table 2) and Church Income (Table 3).
 - d. Highly Restricted - Data that can be accessed by a very select group of individuals and entities for specific, limited purposes based upon a formal review and approval process by GCFA staff. This information includes:
 - i. Individual contact information for clergy (including personal addresses, email, and business phone numbers) and lay leadership. This data may be used for the purposes of research and the communications by the Council of Bishops, general agencies, and the Connectional Table.
 - ii. Individual contact information for General Conference delegations. This data would be managed by The Commission on General Conference and its staff.
 - e. Confidential - Data that cannot be distributed by GCFA to outside entities for any purpose.
 - i. Data stored in GCFA databases on behalf of other entities for their internal use only. This includes data maintained in GCFA's Ezra database which is not included in the normal transmission of data between conferences and GCFA, and any additional data that GCFA has not formally requested from the conferences.
 - ii. Personal contact information used internally by GCFA staff in the course of business, including home address, cell phone numbers, and other personal contact information, unless designated for business use.
6. Access to data shall be depended upon the relationship of the individual or entity to The United Methodist Church.
7. All parties requesting data not readily and freely available to the public shall make a formal request for data which shall include the specific purposes for which the data is to be used. Upon review and approval of this request by GCFA staff, the requesting individual or entity shall agree in writing to abide by the data policies and practices of GCFA.

8. In instances where formal data sharing service agreements and contracts have been entered into by GCFA and other individuals and entities, GCFA staff may dispense with the formal process for reviewing and approving individual data requests.
9. No information shall be supplied to any entity or person if intended for use in connection with a special conference-wide or church-wide financial appeal unless the appeal has been approved in accordance with the provisions of ¶ 613.2 or ¶ 819, respectively.
10. All data storage and sharing policies shall conform with the laws and governmental regulations pertaining to the collection, storage, and distribution of personal data. No information shall be disseminated in a way that contravenes data security laws and regulations where the person or entity resides.
11. Information shall not be made available to commercial firms or other enterprises operated for profit for their own use.
 - a. This provision shall not restrict the use of data by firms providing services to approved individuals or entities.
 - b. Those individuals and entities providing GCFA data to firms for approved purposes shall be responsible for ensuring the data is used in accordance with this policy and the provisions of any data sharing agreements established with GCFA.
12. In limited instances of special circumstances, information may be distributed to entities or persons not regularly authorized upon express written approval by the General Secretary (or other elected GCFA staff she or he designates) and the Chairperson of the Committee on Connectional Outreach. Actions taken will be reported to the Committee on Connectional Outreach.

Procedures

Constituents will be assigned to categories which will dictate their level of access of GCFA data, which are as follows:

Constituent	Public	Limited Access	Restricted	Highly Restricted	Confidential
GCFA	X	X	X	X	X
Bishops	X	X	X	X	
General Agencies	X	X	X	X	
Annual Conferences	X	X	X	X*	
United Methodist Schools, Colleges, Universities, Hospitals, entities related to general Church agencies, annual/jurisdictional	X	X	X		

Constituent	Public	Limited Access	Restricted	Highly Restricted	Confidential
conferences, Homes, and other affiliated organizations, and institutions related to the general agencies, annual and jurisdictional conferences of The United Methodist Church					
Districts	X	X	X		
Local Churches	X	X	X		
Individual United Methodists	X	X			
Academic Researchers	X	X			
Non-United Methodist individuals or entities, for the purposes of research	X	X			
Non-United Methodist individuals or entities, for purposes other than research	X				

*Highly restricted data available to annual conference only for that annual conference.

Responsibility

The Director of Data Services shall be responsible for implementing and overseeing this policy.

Originating Committee

Connectional Outreach