

## FUMC Policy On Data Request

All Request for data made to FUMC should be sent to the business manager and cc: The Data Team Leader. Request for data will be handled under the following procedures:

1. The request must clearly state what data is needed and the purpose for which the data will be used.
2. The business manager will determine whether the request for data is clearly appropriate, based on the requestor, the type of data requested, and the purpose for which it is requested. If there is any concern that the request is not appropriate, the business manager will request a determination by the senior pastor, who may consult with lay leadership and other staff as needed. The business manager will notify the requestor within 2 days of the request that the request is being reviewed. Notification of a final decision will be forwarded no later than one business day following a final decision to provide a status of the data request.
3. The request will be acknowledged within two business days by the business manager (allowance will need to be made for time out of office). This acknowledgement will include:
  - a. If the request is fully understood and the information is readily available, a proposed time for when the data will be provided. The data will be developed and delivered by FUMC staff unless other arrangements are made.
  - b. If the request is not fully understood, a request for clarification achieved either by email or scheduled meeting. A member of the data team may attend any meeting at the discretion of the requestor, the business manager or the data team chair. a response to the requestor to be sent no later than the following business day to provide a status on the data request. All such reviews should take place within two weeks with a response to the requestor to be sent no later than the following business day to provide a status on the data request.
  - c. If the data is not considered to be readily available, the business manager will approach the data team chair for assistance in developing and/or retrieving the requested data. An acknowledgement will be sent to the requestor stating that the request is being reviewed to determine how the staff and data team can provide the information. This review may

## FUMC Policy On Data Request

involve meeting with the requestor, although this may not be necessary. All such reviews should take place within two weeks with a response to the requestor to be sent no later than the following business day to provide a status on the data request.

4. Requested data will be sent to the requestor by the data preparer using appropriate care to protect any sensitive data. The church business manager and the data team leader will receive copies of the provided data. Exceptions to this can be made by the sr. pastor or the sr. associate pastor (business manager will send data team leader notice of data being sent if pastors rule that data cannot be sent)
  - a. All data request will be reviewed to verify:
  - b. The requestor has a legitimate reason for requesting the data.
  - c. Non Personal Information (NPI), sensitive data (personal and/or family health situations, financial commitments, and other similar non-public information) are shared only with individuals or groups that need the information.
  - d. No federal, state or local laws forbid the sharing of the information in the manner requested.