

Are We Keeping It Confidential?

9 questions to ensure financial and personal confidentiality.

Use the following check list to gauge how your church is doing at securing confidential information.

HOW ARE WE DOING	YES	NO	WORKING ON THIS
Are offerings and other financial documents always stored in a secure or well-supervised area?			
Do we regularly shred old financial records with personal information?			
Are there limits to what the church staff can access in the church office?			
Do we change the safe combination or password when someone is no longer authorized to use it?			
Do we currently have a confidentiality policy on shared verbal information?			
Do we currently have procedures in place to keep financial and personal records private?			
Do we have all personal information behind safe doors or secured with password protection?			
Do we strictly limit who has access to the safe, or the passwords?			
Is there limited access to the church office?			

Verbal sharing is sometimes overlooked in discussions about church-office confidentiality. On the phone or in person, office employees field questions about personal appointments or express concerns about church members.

Guarding against others listening in can be difficult. Some suggestions:

Put it in writing.

One church administrator at a large Baptist church on the West Coast said that all office workers must sign a statement of confidentiality before being hired. Employees

that breach this rule are dismissed. Several churches include a confidentiality clause in their employee handbooks.

Clear the area.

Information can be leaked unintentionally. If a secretary gets a phone call from a distraught person, the secretary may have to ask questions before directing the call. If potential eavesdroppers are nearby, the caller should be put on hold until the area can be cleared.

Put a lid on the log.

Many offices log in phone calls or keep copies of messages. This information could be harmful if shared with others. It might be wise to limit access to the church office, particularly after office hours.

Stress confidentiality.

People who work in the church office should be regularly reminded of their role in maintaining confidentiality. What each person should ask prior to divulging information is, "Does this person have a qualified need to know it?" If not, the information should be kept quiet.