

Church Management System Policy

1. **Purpose:** This policy establishes guidance for Bath Presbyterian Church's church management system (ChMS) addressing the system's role, information handling, permissions, and cybersecurity.
2. **System Role:** The ChMS assists management and business aspects of the church. Specifically, the ChMS provides functionality for: managing the church's contacts of congregants, donors, and members; maintaining authoritative information on the church's contacts; tracking giving to the church; and, maintaining the church's authoritative, internal financial records. The system primarily serves the church officers - the Clerk, Financial Secretary, and Treasurer. Additional functionality may be provided depending on the specific ChMS platform utilized.
3. **Information Handling:**
 - a. The ChMS shall serve as the authoritative source of Bath Presbyterian Church's information referenced in the System Role section of this policy (with the exception of the Church Register as an authoritative source for various membership information).
 - b. As the authoritative source of church information, all those accessing the system must handle such appropriately and only for official uses.
 - c. Information within the system should be readily accessible for a minimum of 3 years. After this period, information should be retained as required by other guidance for a period no shorter than 7 years.
 - d. Routine backups should be completed through either the platform or Bath Presbyterian Church.
 - e. Personally identifiable information should be minimized to the maximum extent possible.
4. **Permissions:**
 - a. Permissions to the ChMS should be overseen by the Admin & Finance Committee in alignment with the guidance below.
 - b. Church officers – the Clerk, Financial Secretary, and Treasurer – shall be administrators of the ChMS with full access to all information and capabilities. These permissions should be utilized in alignment with this policy respecting their roles for the church along with the need for resiliency in permissions.
 - i. The Clerk shall be the primary user for the creation, updating, and deletion of the church's contacts and related information within the ChMS.
 - ii. The Financial Secretary shall be the primary user for the creation, updating, and deletion of giving and pledge information within the ChMS
 - iii. The Treasurer shall be the primary user for the creation, updating, and deletion of financial, accounting, and budget information within the ChMS.
 - c. Ruling Elders currently serving on Session and the Pastor shall be granted view-only access to information within the ChMS. The amount of pledges and giving by individual person(s) and other information deemed sensitive by the Admin & Finance Committee shall be hidden.

- d. At the request of a church officer – the Clerk, Financial Secretary, and Treasurer – the Admin & Finance Committee shall allow others assisting in church management functions access to the ChMS with the minimum level of permissions necessary.
- e. Users should ensure their password is complex in nature and not share this with anyone else. Each individual requiring access to the ChMS shall utilize their own account.

Approved by Session on May 19th, 2024.