



## **Credentialed Leaders and Membership Records**

**12.26.23 – Reference to Member Services changed to Member Support, title change for new COO and reference added to new Member Model Policy.**

### **1.0 Purpose**

The purpose of this policy is to ensure that records for our members and credentialed leaders are accurately and responsibly maintained.

### **2.0 Persons Affected**

These records include all Unity Worldwide Ministries (UWM) member ministries, member ministers and licensed Unity teachers.

### **3.0 Policy**

- 3.1 UWM maintains records for all its members and credentialed leaders. These records are used by UWM staff and volunteers in the conduct of UWM business.
- 3.2 They are confidential and the information in these records is not shared with outside parties unless there is a signed release authorizing UWM to do so. Such signed releases are used by Member Support to share ministry records and minister's resumes.
- 3.3 Membership records include hard copy files and electronic database.
- 3.4 All UWM staff and volunteers who have access to membership records must sign a confidentiality agreement.
- 3.5 Records pertaining to ethical allegations and ERS (Ethics Review System) reviews are kept separately in a secured location. These records are under the supervision of UWM's Chief Operating Officer. These records are not available for UWM staff except as required.

### **4.0 Definitions**

- 4.1 Credentialed leader refers to a Unity minister or individuals who are licensed and/or ordained by UWM, or a licensed Unity teacher.

4.2 Member ministry refers to a Unity ministry that has approved membership in UWM as per the latest UWM Membership Model

4.3 ERS refers to UWM's Ethics Review System.

### **5.0 Responsibilities**

5.1 The Member Support Department maintains hard copy membership records.

5.2 The database is maintained by the Member Support Department.

5.3 The UWM Chief Operating Officer maintains the ERS files and determines which staff have access to these records.

5.4 The Member Support Department obtains signed releases when there is a need to share information in membership records.

### **6.0 Procedures**

Not Applicable.

**Supporting Documents:** Confidentiality Agreement, UWM Membership Model

# Confidentiality Agreement

## For Unity Worldwide Ministry Staff & Volunteers

As a staff member or volunteer with Unity Worldwide Ministries, I \_\_\_\_\_ understand that all records pertaining to Unity ministers and ministries are confidential and I agree to handle such information with integrity and care.

Contact information of UWM members, both individuals and ministries, cannot be shared outside of UWM's official business.

UWM records may also contain sensitive information about individuals and/or ministries who have been under review or whose actions have been called into question. This information is strictly confidential and is only shared with UWM Member Support staff on a "need to know" basis. Should I come across any such information, I will advise the Member Support Team Lead, Chief Operating Officer or their designee. If I need someone to process any of this information with, I will contact Member Support for assistance.

I understand that the confidentiality of UWM records is a sacred trust, and that breaching confidentiality will result in my being released from my position and could lead to an Ethics Review Investigation depending on my status as a UWM member.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
UWM Member Support Staff