

Stewardship of Information in Church Management Software

(Created October 2022)



Diocese of
Green Bay



Code of Canon Law

TITLE III.

GENERAL DECREES AND INSTRUCTIONS

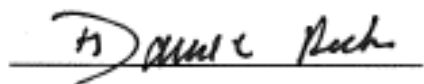
Can. 34 §1. Instructions clarify the prescripts of laws and elaborate on and determine the methods to be observed in fulfilling them. They are given for the use of those whose duty it is to see that laws are executed and oblige them in the execution of the laws. Those who possess executive power legitimately issue such instructions within the limits of their competence.

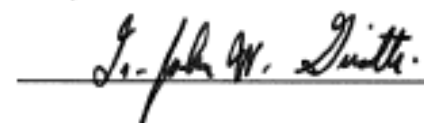
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DOCUMENT APPROVED AND REGISTERED

October 14, 2022

Bishop David L. Ricken, JCL, Bishop of Green Bay
Reverend John Girotti, Vicar General and Moderator of the Curia


Bishop David L. Ricken


Very Rev. John Girotti



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Introduction

Following is a Stewardship of Information in Church Management Software Policy governing data ownership, access to data, training and usage of parishioner information and parish data. Throughout this document certain terms are used to clarify what qualifies as “personal” and “non-personal” information.

Personal information is defined as any information that identifies a specific person or family. Personal Information may include, but is not limited to, name, address, telephone number, email address, and individual contributions.

Non-Personal information is *parish specific data* and does not reveal the identity of individual parishioners.

The scope of this policy is oriented towards how diocesan staff interact and utilize the information contained in the standard parish church management software, namely GabrielSoft. This policy may also serve to inform parish staff and volunteers who serve in leadership positions (i.e., trustees and parish council members) or assist with certain data entry with permission of the parish pastor or pastoral leader. This policy may be leveraged by parish pastors/pastoral leaders and parish staff in defining specific parish security policies. It may also be shared with all parishioners.

Privacy and Confidentiality

All information within the church management software concerning parish staff, parishioners, clergy and diocesan business is confidential. All employees (diocesan and parish) are required to sign a confidentiality statement as condition of employment (see *Addendum A: Privacy and Confidentiality*).

In Service to the Mission

The goal of this document is to stipulate a general policy for access to *personal* data and enable parish and diocesan staff to utilize *non-personal* information to better understand our mission fields and service to the mission of the Church.

Policy Approval

Final approval of these policies rests with the Chancellor, Vicar for Clergy, Vicar General and Moderator of the Curia. Feedback and consultation are solicited from the diocesan GabrielSoft Operating Committee, the GabrielSoft Parish Advisory Board, the Bishop’s Presbyteral Council and Regional Vicars.

Ownership and Data Access

Accurate, timely and protected data begins with understanding ownership. The following tables provide a framework of responsibilities and data access.

Table 1: Ownership and Responsibilities

What	Who	Notes
Stewardship of Information in Church Management Software Policy	Parish Operations, HR and IT	This policy is maintained as a collaborative effort between Parish Operations, Information Technology and Human Resources.
Data Ownership Parishioner <i>personal Information</i>	Pastor/PL and designated parish staff	Family and member status, names, addresses, contact information, member demographic data, member sacramental information, family contributions, committee assignments (standard & church), and religious education.
Data Ownership Parish <i>non-personal Information</i>	Pastor/PL and designated parish staff	Parish name, site location(s) addresses, parish phone and email contact information, Mass times and counts, aggregate level offertory and fund accounts.
Data Ownership Diocesan <i>personal information</i>	Clergy & Parish Leadership	Priest and Deacon personal information and parish/school assignment status.

Table 2: Access to Data

What	Who	Notes
Access to parishioner <i>personal information</i>	Pastor/PL, designated parish staff and approved diocesan roles	Designates one or more Church Administrators; assigns other roles as appropriate (staff & volunteers), administers Member Portal. See <i>Addendum B: Diocesan Policy for GabrielSoft Security and Data Access</i> .
Access to parish staff and certain parish leaders contact information	Human Resources Parish Operations Chancellor's Office	Standard Parish Committees (e.g., parish staff, pastoral council, finance council and trustees).
Access to Parish <i>non-personal Information</i>	Parish Operations, Chancellor's Office, Clergy & Parish Leadership, Finance & Accounting	Via diocesan reports (<i>non-personal information</i>) – e.g., number of registered households, number of active members, number of contributors, number of sacraments, aggregate level weekly contributions, aggregate demographics, weekly Mass counts by Mass time and location.
Access to Clergy Data	Clergy & Parish Leadership	Priest and Deacon current parish assignment for assigned parish staff.

Table 3: Administration Access

What	Who	Notes
Universal Access	Diocese Admin	For purposes of backup to parish level security recovery and for global report writing capabilities, two diocesan users are retained as diocesan administrators: IT Director and DB Admin/Analyst & Church Mgt. Software Technical Support.

Training

GabrielSoft, as a part of the diocesan agreement, provides online training and education resources for all application modules and functionality. GabrielSoft also administers new user login accounts and is the first level of support to parishes via their Helpdesk.

The Office of Parish Operations and Mission Planning are responsible to provide specific training for diocesan standard usage and diocesan data entry standards.

The Office of Parish Operations and Mission Planning also provides customized reporting for both parish and diocesan requests. Both parish and diocesan report requests are submitted via a report request form (*Addendum E: Custom Report Request*).

Audit on Usage

To ensure alignment to this policy, three reports are monitored on a quarterly schedule. The results of these reports are to be reviewed by Parish Operations, Information Technology and Human Resources.

Reports include:

- Parish Administration: User Security
- Diocese Security by Username
- Diocese Users Security Summary



Addendum A: Privacy and Confidentiality

Curia Employee Handbook and Parish & School Employee Handbook

Confidentiality

“All records and files of the Diocese and its employers are employer property. Unless records are generally available to the public they are considered confidential. No employee is authorized to copy or disclose any confidential file or record. In the event of doubt regarding the confidential nature of a file or record, the employee is to consult his/her supervisor. Access to records and information does not necessarily authorize employees to disclose the contents.”

- Acknowledgment forms
 - Employee Handbook – Disclaimer & Acknowledgment of Receipt of Handbook
 - Confidentiality Agreement
 - Employee job description inclusive of GabrielSoft access

Confidential information should never be discussed with or disclosed to anyone outside the Catholic Diocese or with an employee of the Catholic Diocese who does not require the information in order to perform the functions of his or her job. Confidential information includes, but is not limited to, name, date of birth, marital status, sacramental information, address, phone number(s), email address(es), financial donations, etc.

During the course of your work, you will have access to confidential and privileged information concerning individuals served by the Diocese, employees, and others who transact business with the Diocese. All such information should be considered confidential and only discussed with those who have a specific business need to know.

Disclosure of Information/Breach of Confidentiality

During the course of employment, employees may be exposed to information concerning individuals and parish operations. Such information is considered confidential and proprietary and must not be disclosed to unauthorized persons on or off premises. Breach of Confidentiality will result in discipline, up to and including immediate termination. In the event of termination of employment, whether voluntary or involuntary, employees are required to keep information gained during the course of their employment confidential and not utilize or exploit such information.

Additional Church Management Software Agreements

As a part of the new user administrative setup provided by GabrielSoft, following are two agreements that a new user must agree to, prior to completing their request to be added as a user of GabrielSoft.

- GabrielSoft External Facing Services Agreement
 - Applies to the services offered by GabrielSoft to the extent customer uses such services (e.g., email through Gabriel, Gabriel Parishioner Portal) for sending electronic messages or for the creation and hosting of, or for posting material on, external-facing websites (the “External- Facing Services”).
- GabrielSoft Master Subscription Agreement
 - User acknowledges they are authorized to access and use the services under an existing agreement between the entity (parish/diocese) and GabrielSoft/eCatholic.

Addendum B: Diocesan Policy for GabrielSoft Security and Data Access

GabrielSoft Security Module	Curia Office/Role	Access Level (reason) Refer to <i>Addendum C</i> for GabrielSoft role definitions.
Diocese Security Module	<ul style="list-style-type: none"> ▪ IT Director ▪ DB Admin/Analyst & Church Mgt. Tech. Support 	Dio Admin (back-up, global report creation, software enhancements and maintenance)
Diocesan Church 0¹	<ul style="list-style-type: none"> ▪ Clergy Leadership ▪ Parish Operations 	Family Manager (clergy) Committee Manager (clergy)
Diocesan Church 0 Issue and HR Module	<ul style="list-style-type: none"> ▪ Catholic Charities: Social Ministry & Community Outreach ▪ Catholic Schools ▪ Clergy & Pastoral Leadership ▪ Human Resources ▪ Finance & Accounting ▪ Parish Operations 	Limited Curia Management Roles <ul style="list-style-type: none"> □ Track and coordinate cross-functional support for parishes and schools □ Standard Committee Member Contact Info. (i.e., parish staff)
Diocesan Reports <i>non-personal Information</i>	<ul style="list-style-type: none"> ▪ Chancellor ▪ Clergy & Pastoral Leadership ▪ Parish Operations ▪ Curia individuals in support of job responsibilities 	View and download reports that draws from parish data at an aggregate level, to include: registered households, active members, number of contributors, aggregate offertory, Mass counts, Mass times and locations, number of sacraments, aggregate demographics (e.g., age).
Diocesan Reports <i>personal Information</i>	<ul style="list-style-type: none"> ▪ Catholic Foundation ▪ Curia individuals in support of specific needs 	Refer to <i>Addendum D: Temporary Access to Parishioner Personal Information</i> .
Parish Committee Module	Chancellor	Committee Manager (trustee info/communications)
	Clergy & Pastoral Leadership	Committee Manager (clergy assignments)
	Human Resources	Committee Manager (parish staff info/communications)
	Parish Operations	Committee Manager (support & training)
Parish Family Module	Priest & Pastoral Leader Formation	Family Manager (clergy info and assignment status)
	Parish Operations	Family Manager (support & training)
Parish Fund Module	Finance & Accounting	Fund Manager (one support logon account) (fund accounts and attributes support & training)
Ministry Scheduler Module	Parish Operations	Ministry Scheduler Manager (support and training)
Religious Education Module	<ul style="list-style-type: none"> ▪ RE and Youth ▪ Parish Operations 	Religious Education Manager (support and training)
Parish Security Module	<ul style="list-style-type: none"> ▪ IT Director ▪ Parish Operations 	Security Manager (back up, support and training)

¹ Church 0 contains clergy information and diocesan Issue Management Module and is not accessible by parishes.

Addendum C: GabrielSoft Application Modules and Login Role Definitions

GabrielSoft Application Module	Login/Security Role	Description
Committee Module	▪ Manager	Able to manage all aspects of the committees and their members.
	▪ Contributor	Able to manage committee memberships.
	▪ Not Applicable	Renders no access to this module.
Family Module	▪ Manager	Able to manage all aspects of family information and associate a family/member to a parish, excludes contributions.
	▪ Contributor	Able to manage the core family and member data.
	▪ Not Applicable	Renders no access to this module.
Fund Module	▪ Manager	Able to manage all aspects of funds, attributes and member contributions.
	▪ Contributor	Able to modify pledges and contributions.
	▪ Not Applicable	Renders no access to this module.
Issue Module	▪ Administrator	Able to view and manage all non-HR issues regardless of who created.
	▪ Manager	Able to view and manage all non-HR issues that they created or are a team member of.
	▪ Contributor	Able to contribute notes and documents to all non-HR issues that they are a team member of.
HR Issue Module	▪ Administrator	Able to view and manage all HR issues regardless of who created them.
	▪ Manager	Able to view and manage all HR issues that they created or are a team member of.
	▪ Contributor	Able to contribute notes and documents to all HR issues that they are a team member of.
Member Portal Module	▪ Contributor	Users in this role are able to log into the Member portal to manage their family and member contact information.
	▪ Contributor	Able to manage committee memberships.
Ministry Services Module	▪ Manager	Able to manage all aspects of ministry services.
	▪ Contributor	Able to help assign members to existing schedules.
	▪ Not Applicable	Renders no access to this module.
Religious Education Module	▪ Manager	Able to setup and manage all aspects of the religious education students, classes and catechists.
	▪ Contributor	Able to modify classroom assignments.
	▪ Not Applicable	Renders no access to this module.
Security Module	▪ Manager	Able to manage all aspects of user management.
	▪ Contributor	Able to modify role assignments.
	▪ Not Applicable	Renders no access to this module.



Addendum D: Temporary Access to Parishioner Personal Information

In cases where a curia employee requires access, or edit capability, of GabrielSoft data beyond a standard security profile, the following request form must be submitted to the Parish Operations GabrielSoft Administrator. Approval rests with the Parish Operations and Mission Planning Director and Chancellor, who may seek consultation from the Information Technology Director, Human Resources Director or Vicar General and Moderator of the Curia.

Request for Access to Parish Data in GabrielSoft²

Parish Name:		
Parish City:		
Pastoral Leader:		
Date Requested:		
Start Date for request:		
End Date for request:		
What data is being requested for access (view) ? (Circle all that apply)	Families/Members Contributions Pledges Committees Religious Education Ministry Scheduler Administration	
What data is being requested to edit ? (Circle all that apply)	Families/Members Contributions Pledges Committees Religious Education Ministry Scheduler Administration	
What Gabriel logon name(s) will be accessing or changing the data?	Name and Role: Existing GabrielSoft Login:	
I authorize the following: <input type="checkbox"/> Access to view and download data <input type="checkbox"/> Edit (insert/update/delete) capabilities to the Gabriel Parish instance named above. The following criteria must be met. 1. Only the Gabriel logons listed above are allowed to access or edit data. 2. Access/edit capabilities are allowed between start and end dates above. 3. Only data circled above is allowed to be accessed or edited.		
Supervisor Signature:		Date:
Supervisor Printed Name: Title/role:		
Parish Operations Signature:		Date:
Chancellor Signature:		Date:

² Parish Operations is responsible to maintain archives and audit start and end dates of all access requests.



Addendum E: Custom Report Request

For both parish and diocesan custom GabrielSoft report requests the following form must be submitted to the Parish Operations GabrielSoft Administrator. Prioritization and final approval rests with the Parish Operations and Mission Planning Director.

Report Request Gabriel Software

Report Name:	
Parish Name/City: Or Diocesan Office/Team:	
Pastoral Leader: Or Diocesan Employee Supervisor:	
Category:	Families/Members Contributions Pledges Committees Religious Education Ministry Scheduler Administration
Requested By:	
Date Requested:	
Fields Requested on Report:	
Data Required to Produce Report:	
How often is this Report needed?	
Parish Approval:	
Parish Approval Date:	
Date Report is needed:	
Data input required by Parishes:	
Reason for the Report:	
Signature:	



Addendum F: Diocesan Staff Process for Church Management Software Access

Pre-Requisites for New Logon and Access

1. Requested via “New Hire & Internal Transfer Request Form” administered by IT, F&P and HR.
 - ✓ Sign Confidentiality Agreement (*Addendum A: Privacy and Confidentiality*)
2. Complete a GabrielSoft training program approved by Parish Operations, Parish Advisory Board and Finance & Accounting.
 - ✓ Includes module based training on software support available for Family, Fund, Sacraments, Committees, Services, and Report Library Modules.
3. Gabriel Software Administrator (Dio Admin) must receive validation of steps 1 – 3 (employee prerequisites) prior to employee logon approval and role setting.

Pre-Existing Logins for Continued Access

For existing diocesan logon accounts that do not match the Diocesan Policy for GabrielSoft Security and Data Access (page 6), the account will be rendered inactive until steps 1 – 3 are completed.