

**TEMPLE BETH ZION
POLICY ON PRIVACY OF CONGREGANTS' INFORMATION
AND SHARING OF MEMBERSHIP MAILING LIST**

PREAMBLE

At various times and for a variety of purposes, Temple Beth Zion ("TBZ") requests of its members, and its members provide to TBZ, personal information about themselves and their families. Examples of such information that may be collected by TBZ concerning its members include contact information, such as mailing address, e-mail address and telephone (land line and/or mobile) numbers; family member information; professional information including place of employment; and financial information.

TBZ is committed to protecting the privacy of its members' personal information entrusted to TBZ. To that end, when TBZ receives requests from outside organizations or individuals to share its member information, it has been TBZ's practice to decline such requests, except in certain limited circumstances, and only where, after thorough deliberation, TBZ determines, and secures commitment from the requestor, that the information shared and its use will be appropriately limited, that the information will be used solely for purposes that are beneficial to TBZ and/or the community as a whole, that the use of the information will not be detrimental to TBZ's members, that the requestor gives assurance to the satisfaction of TBZ that the information will in no event be used for improper or commercial purposes, and that the information will be destroyed once the authorized limited use is concluded. For example, TBZ annually provides member names and addresses to our umbrella organization, the Union for Reform Judaism,

allowing our members to receive Reform Judaism magazine, and to the Jewish Federation of Greater Buffalo (“Federation”), so that Federation may identify unaffiliated Jewish households in the community (a benefit to all local congregations, including TBZ) and so that our members may receive the Jewish Journal publication of the Federation, which is used by all congregations, including TBZ, as an important tool to communicate to our entire community.

Recently, TBZ received requests from Federation to use TBZ members’ personal contact information for two purposes beyond and in addition to the limited circumstances under which TBZ has annually allowed use of its members’ information. First, after thorough research and on a one time basis only, TBZ allowed Federation to use its members’ names and addresses to promote Jewish literacy by allowing the PJ Library to send a non-obligatory Jewish book to every Western New York Jewish household, including members of TBZ. Second, in connection with the Greater Buffalo Jewish Community Study recently completed by the Cohen Center for Modern Jewish Studies/Steinhardt Social Research Institute at Brandeis University (“Cohen Center”) under contract with Federation, TBZ, along with every other Western New York Jewish agency and congregation, provided the Cohen Center with the names and mailing addresses of its members for a one time use in conducting a comprehensive demographic study of our local Jewish community. In addition, the Cohen Center requested that TBZ share its members’ telephone numbers and e-mail addresses in order to maximize the sample of those in our Jewish community participating in the demographic study. In order to protect our members’ privacy, TBZ declined to authorize the release of telephone numbers or e-mail addresses of members who chose not to share such information with

those conducting the study. To that end, TBZ informed all of our members of the Cohen Center's request for our members' telephone and e-mail contact information, and afforded each member the opportunity to opt out. Accordingly, telephone number and e-mail address information was provided only with respect to those of TBZ's members that authorized such disclosure by refraining to opt out.

In 2012, prior to publishing the congregational membership directory, including members' telephone numbers and e-mail addresses, TBZ engaged in a series of communications seeking permission from its members and allowing them to opt out of being included in the printed directory. In connection with circulating the membership directory to its members, TBZ asked its members to use the directory in a respectful manner and in all instances to refrain from commercial use of the membership directory. TBZ is not aware of a single instance of the directory or the published membership information being used improperly or for commercial purposes.

In light of TBZ's commitment to safeguarding the privacy of its members' personal information, its traditional practices in that respect and the recent history of extraordinary requests for members' personal information, the Board of Trustees determined to study the subject and to adopt a uniform policy. Accordingly, the Board of Trustees hereby adopts the following **POLICY ON PRIVACY OF CONGREGANTS' INFORMATION AND SHARING OF MEMBERSHIP MAILING LIST:**

POLICY

- 1.** It is the policy of TBZ to protect the privacy of the personal information entrusted to TBZ by its members.
- 2.** Unless compelled by law or authoritative legal process, TBZ will not provide, to any outside organization or individual, any TBZ member's personal financial information, including but not limited to any TBZ member's credit or debit card numbers maintained on file with TBZ.
- 3.** Except in limited circumstances, TBZ will decline requests by outside organizations or individuals for personal information of TBZ members, including but not limited to contact information.
- 4.** All requests by outside organizations or individuals for TBZ members' contact information will be evaluated based on the following factors:
 - a.** The type of information requested must be well defined;
 - b.** The proposed use by the requestor of the shared information must be appropriately limited;
 - c.** The purpose or purposes for which the information is proposed to be used must be seen as beneficial to TBZ and/or the community as a whole;
 - d.** The purpose or purposes for which the information is proposed to be used must be seen as not detrimental to TBZ's members;
 - e.** The requestor must give assurance, in substance and form satisfactory to TBZ, that the information will not be used for improper or commercial purposes, or for any purpose beyond the use authorized by TBZ;

- f.** The requestor must give assurance, in substance and form satisfactory to TBZ, that all copies of the information will be returned to TBZ or destroyed once the authorized limited use is concluded.
- 5.** TBZ will not disclose, to an outside organization or individual, any TBZ member's telephone (land line and/or mobile) numbers or e-mail addresses without first notifying the member of the request for such information, and affording the member the opportunity to decline such request or opt out.
- 6.** All requests by outside organizations or individuals for personal information of TBZ members must be made to TBZ's Executive Director.
- 7.** No request by outside organizations or individuals for personal information of TBZ members will be accepted, and no personal information of TBZ members will be provided, without the unanimous consent of TBZ's Executive Director, Senior Rabbi and President.
- 8.** In order that the Board of Trustees may be informed of the manner in which this Policy is implemented, and so that the Board of Trustees may from time to time make any changes or amendments to this Policy as it deems appropriate, the Executive Director will, as soon as reasonably practical, inform the Board of Trustees whenever TBZ members' personal information is disclosed pursuant to a request of an outside organization or individual.

Adopted by the Temple Beth Zion Board of Trustees on November 19, 2013

Amy Schaefer, Secretary