

## **Confidentiality Policy and Certification for Second Unitarian Church of Omaha Audit Team**

The Bylaws of the Second Unitarian Church of Omaha (Church) require biennial audits to be performed. The Board of Trustees determines whether these audits can be performed by volunteer members of the Church (this is usually the case). The group of volunteers performing the audit is referred to as the Audit Team. Each Audit Team selects an Audit Lead who is responsible for managing and completing the audit. A responsibility of the Audit Lead is to share and obtain the signature certification of each volunteer's understanding of this policy.

Respecting the privacy of our donors, members, staff and volunteers and of the Second Unitarian Church of Omaha (Church) is a basic value of our church. Personal, financial and donor information is confidential and should not be disclosed or discussed with anyone without permission or authorization from the Audit Lead. Care shall also be taken to ensure that unauthorized individuals do not overhear any discussion of confidential information and that documents containing confidential information are not left in the open or inadvertently shared.

Members of the Church's Audit Team may be exposed to information which is confidential and/or privileged and proprietary in nature. It is the policy of the Church that such information must be kept confidential both during and after volunteer service as an auditor. Audit volunteers are expected to return materials containing privileged or confidential information upon completion of the applicable audit review and testing. Downloading of confidential information onto the personal computers of the audit team should be avoided. If downloading occurs, files should be deleted.

Unauthorized disclosure of confidential or privileged information is a violation of this policy and will subject the person(s) who made the unauthorized disclosure(s) to appropriate actions by the Board of Trustees to address and remediate the violation.

### **Certification**

I have read the "Confidentiality Policy and Certification for Second Unitarian of Omaha Audit Team" presented above. I will not disclose confidential information belonging to or obtained through the performance of the audit with any person, including relatives, friends and associates. I agree to abide by the requirements of the policy and inform the Audit Lead immediately if I believe any violation (unintentional or otherwise) of the policy has occurred. I understand that violation of this policy will lead to appropriate actions by the Board of Trustees to address and remediate the violation.

Signature of Audit Volunteer \_\_\_\_\_

Date \_\_\_\_\_ Printed Volunteer Name \_\_\_\_\_