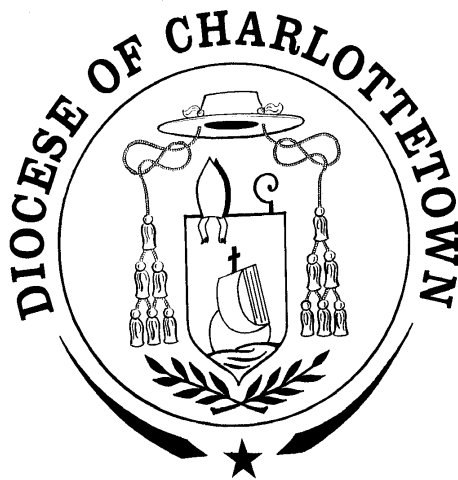


# *Strengthening the Caring Community*

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## *Parish Volunteer Screening Program*



Original Policy Implementation: May 2010  
First Revisions: September 2014

This manual is prepared for Parish Volunteer Screening Committees,  
Parish Community Leaders, volunteers, participants,  
and all members of the various Parish communities in the Diocese of Charlottetown

This document is based largely on "Strengthening the Caring Community" by the Archdiocese of Toronto, 2005 which draws on a reference manual developed by Volunteer Canada. Neither Volunteer Canada nor the Archdiocese of Toronto share pastoral responsibilities with the Diocese of Charlottetown.

The content in this document that is highlighted in yellow is a revision from the previous policy. The original policy was implemented in May 2010. The first revisions have been implemented in summer 2014.

Newest Revision December 9, 2015

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May 15, 2014

Dear Friends:

The Church today cannot operate without volunteers, and the Diocese of Charlottetown has always enjoyed the service of many gifted persons who give of their time and talent. Three years ago the Diocese of Charlottetown introduced a Screening Program now called “**Strengthening the Caring Community**”. As a volunteer in this program you have done much to implement this program in your Parish and for that your every effort is greatly appreciated.

The Diocesan Committee has performed miracles to get this program up and running. It is a program that is constantly evolving and that is why it is referred to as a “Work in Progress”. The Diocesan Committee has implemented the program with your help, went out to the Parish Zones to get your feed-back, and as a result have made several revisions. The Revised Manual is now ready and will soon be in your hands.

It is known that many Parishes have formed excellent Teams or Committees to set-up this program in their parishes. Other parishes have commenced the implementation and have work to do; but other parishes have had difficulty getting off the ground. This is the opportunity to have everyone on board and get the program up and ready. It is a known fact that you all deal with the same subject matter in school, Boy Scouts, Girl Guides, Hockey, soccer, etc. We are living in an age where we unfortunately have to protect our volunteers; and see that our youth, vulnerable adults, teachers, Clergy, etc. are protected. That is why the “Strengthening the Caring Community” is essential in our Diocese, Parishes, and Communities.

The Program is excellent in content and should accomplish the mission to protect all who are in need of protection in our parishes. It is with grateful appreciation that I extend sincere thanks to all who have worked so hard to make this Program successful at all levels of our Diocese. Thank you one and all for your most generous efforts in taking this program to where it is today, and advancing us into the future where it will provide even greater protection for all concerned.

Sincerely yours in Christ,

Most Reverend Richard Grecco

## **Purpose of this Manual**

Every parish offering services and programs owes a duty of care to protect its parishioners, its staff members (paid and unpaid) and the community-at-large.

Effective and appropriate management of staff and volunteers is essential to the safe delivery of services and programs. The management of volunteers is as important as the management of paid staff and requires the allocation of appropriate human and financial resources.

This manual provides the parishes in the Diocese of Charlottetown with guidelines and ready-to-use forms for the screening and supervision of volunteers. It is the policy of the Diocese of Charlottetown that these procedures be followed in all of the parish communities under its jurisdiction in order to ensure the protection of volunteers, staff, parishioners and the Diocese of Charlottetown.

## Terminology

### **Duty of Care:**

A general principle in civil law that identifies the obligations of individuals and organizations to take reasonable measures to care for and protect its participants and deliver its programs in a safe and well-managed manner. Canadian courts will hold parishes accountable on the basis of "neglect" if appropriate screening has not been conducted and some incident has occurred.

### **Full Disclosure:**

Volunteers have the right to know and to be informed from the outset of all screening procedures that will be used with respect to any position for which they apply.

### **Participants:**

Those who participate in programs or who receive services from ministries. The word participant is used as a generic term for these people.

### **Position of Trust:**

1. Situations in which someone has a significant degree of:
  - Authority or decision-making power over another
  - Unsupervised access to another person and to her/his property
  - Contact with vulnerable individuals.
2. Situations where the success of the service depends on the development of a close, personal relationship between the individuals as in mentoring, counselling or home visiting programs.

### **Risk Management:**

A process of assessing potential problems and developing strategies for solutions to minimize the risk. In other words, it involves looking at the possibilities of loss or injury that might arise in programs, activities and services and taking steps to stop, minimize, prevent or eliminate them. Screening is an exercise in risk management.

### **Volunteer:**

A person who:

- chooses to undertake a ministry position, service or activity;
- does this ministry activity in service to an individual, or to assist the parish or diocesan community-at-large;
- is not coerced or compelled to do this activity;
- does not receive a salary or wage for this service or ministry activity.

### **Vulnerable Person:**

One who has difficulty protecting herself or himself from harm temporarily or permanently and is at risk because of age, disability, handicap or circumstances such as emotional distress due to extreme crisis or trauma.

## Statement of Purpose

It is the purpose of the Roman Catholic Diocese of Charlottetown:

**1. To safeguard, in all respects, all of those, but most especially the vulnerable, to whom we minister.**

- We have an obligation to protect everyone whom we serve. However, when vulnerable people participate in our programs, we have a much higher obligation to ensure their protection than if they were able-bodied adults who could take care of themselves. This means screening, very thoroughly, people who are going to work with them.

**2. To ensure the integrity, safety and reputation of our volunteers.**

Our volunteer management program ensures that:

- volunteers are working in an organized, structured environment;
- policies and procedures outline the volunteers' rights as well as responsibilities and how they will be supported when an incident occurs;
- position descriptions, interviews and supervision of the volunteer is placed in a position that is best suited to her/his abilities and interests;
- by doing a risk assessment, we take into consideration the personal safety of all involved. The risk assessment ensures that we are not placing a volunteer in a dangerous location (i.e. unsafe equipment or working alone at night) or placing an inexperienced volunteer alone.

**3. To ensure, that, as a faith community, we fulfill all our obligations.**

- The development of screening policies and procedures is intended to meet our legal obligations, but even more importantly adequate screening measures will fulfill our ethical, moral and spiritual responsibilities to promote wholeness, accountability, trust and care in our ministries.

## The Screening Process

Screening begins long before any person offers oneself as a volunteer and ends only after the person leaves the ministry. The Ten Safe Step process, developed by Volunteer Canada, is divided into three sections: before selecting volunteers, the selection process and managing the volunteers.

### Screening Protocol for Each Risk Level

The nature of particular ministry positions and the level of risk involved will determine the intensity of the screening process employed.

#### 1. Protocol for General Risk Ministry Positions

General Risk Parish Volunteer Positions within our Diocese will use the following steps:

- Determine the Risk
- Ministry Position Description
- Volunteer Information Form
- Decision to accept the volunteer or not
- Orientation and Training
- Supervision

#### 2. Protocol for High Risk Ministry Positions

High Risk Parish Volunteer Positions within our Diocese will use ALL of the Safe Steps of Screening".

- Determine the Risk
- Ministry Position Description
- Appropriate Recruitment Process
- Volunteer Information Form
- Interview, as required
- Reference Check
- Vulnerable Sector Criminal Record Check
- Decision to accept the volunteer or not
- Orientation and Training
- Supervision

Refer to Appendix 10 for Checklist of Activities for General and High Risk Volunteer positions.



## Detailed Steps of Screening

### **Step 1 - Determine the Risk**

The nature of the ministry and the inherent level of risk involved dictate the degree of screening required. The greater the risk, the greater will be the degree of screening applied. Factors that will help determine the level of risk include: the participant, the setting, the nature of the activity required and the level of supervision.

Volunteers and employees who are active in more than one ministry will be screened for the position with the highest level of risk. When a person moves from a position with a general level of risk to a position of high risk, the other screening steps will be carried out for the new high risk position.

The nature of the ministry and the inherent level of risk involved dictate the degree of screening required. There are four factors which we consider in order to determine whether a Position is High or General risk: the participant, the setting, intensity of the activity, and the supervision. *(See Appendix 1 for details)*

### **Strategies for the Management of Risk**

When a position is classified as high risk, an effort will be made to manage or reduce the risk by applying one of the following strategies:

#### **1. Eliminate the risk**

There may be activities that have risks and consequences so great that they should be discontinued.

For example: a parish may decide an overnight camping trip with altar servers is an activity with unacceptable risks.

#### **2. Modify the activity**

Change the location and the activity

For example: all home visitations to the sick could be done with at least two volunteers. Youth group leaders could have at least one other adult volunteer present. Meet in a public location rather than a person's home.

### **3. Transfer or Share Liabilities**

Involve other organizations or service groups, which are better prepared to handle the specific risk issue.

For example: transportation of youth or vulnerable adults, such as seniors, could be arranged through a local bus or taxi company.

### **4. Assume the risk but minimize it wherever possible**

Design all volunteer tasks with risks in mind. Ensure that volunteers are screened appropriately using the Strengthening the Caring Community; Parish Volunteer Screening Program. Ensure everyone gets a copy of the Guidelines for Parish Volunteers

### **5. Two Person Rule**

At least two adult persons, preferably unrelated shall be present when involved with children under age 18, youth or at risk adults. Children, youth or at risk adults should never be left in one individual's care behind closed doors or in an isolated or private location. If a group is comprised of children, youth, vulnerable adults of both genders, leaders of both genders must be present.

## **Step 2 - Ministry Position Description**

There will be a role description for every volunteer ministry position. *(See Appendix 2 for list of Ministries)*

It is imperative to describe each ministry position and define its inherent risk. This description defines the tasks of the positions and sets the ground rules for all involved. By documenting the role these descriptions provide greater protection for the person being ministered to, the volunteer, the Parish, and the Diocese.

There must be a ministry role description for every ministry position within the parish. It is imperative to describe each ministry position and define its inherent risk and the measures that will be taken in order to address these risks. The Diocesan Ministry Description form is to be used.

### **Step 3 – Recruitment Process**

Recruitment for volunteers and staff will be done in a formal public process.

Requests for volunteers should be done in a public way through notices printed in parish bulletins, church newsletters or other forms of communication. The notice should be accompanied by a "Description of the Ministry" and notice that an "Information Form" will need to be completed. These two items are powerful screening tools in themselves and prompt people to reflect on the seriousness of their call to this ministry even before any formal interview. Recruiting materials will clearly indicate that the faith community takes its responsibility towards participants seriously and screens all applicants.

Do not leave people with the impression that everyone who applies will be accepted. Be very clear that you are careful about selecting those who work in ministry and do not apologize for that fact.

Volunteer recruitment is usually done less formally than the recruitment of employees. For example, faith communities sometimes encourage parents to move from watching their children participate to helping out with the activities or those already in ministry positions often encourage friends and neighbours to help out. These personal ties between volunteers and the program complicate the screening process. The more informal volunteer recruitment is, the less comfortable recruiters are in applying formal steps. Be careful to establish balance between formalizing the recruitment process and either deterring volunteers from coming forward or appearing desperate for volunteers. Ministry Position Descriptions along with careful promotion and recruitment provide your group with powerful screening measures even before anyone offers herself or himself for a ministry position.

#### **Who will be Recruiting**

Exactly who is responsible for the recruitment of new volunteers is handled differently from parish to parish but the procedures outlined here are consistent throughout the Diocese of Charlottetown.

#### **Recruitment Guidelines**

- Achieve balance between formalizing the recruitment process and appearing desperate for volunteers.
- Be careful about how you recruit, especially for positions of trust with vulnerable positions.
- Being asked to volunteer is a privilege and a calling to a sacred trust, so remember that every volunteer must be placed in a suitable role.
- Use the Ministry Position Description to tell them about the position. There must be a Ministry Position Description for the position being recruited for.

- Ensure that you indicate that screening is part of the application process. It is only fair that there are no surprises, so that people may screen themselves out at this point.
- Maintain consistency in your recruitment process.

### **Recruitment Tools**

One of the ways to move from an informal to a formal process is to use tools such as:

- Print or post notices
- Bulletin/newsletter inserts
- Bulletin boards postings
- Ministry Position Description
- Announcements to whole parish or to smaller groups
- Personal invitations from the a member of the Pastoral Team

### **Actions to be taken**

- Provide Ministry Coordinators/Leaders with the procedures and guidelines for recruitment and be available to assist them in appropriate recruitment strategies.

### **Remember, there is always a choice**

It is better to live with a vacancy than to compromise and put the wrong volunteer into that position. Ask for what you want — no matter how demanding it may sound. As clearly — and truthfully — as possible, describe;

1. The tasks that need to be done. Refer to the Ministry Position Description.
2. An overview of the work. Refer to the Ministry Position Description.
3. Time considerations. Refer to the Ministry Position Description.
4. The ideal qualifications/characteristics. Refer to the Ministry Position Description.
5. Indicate the benefits — tangible and intangible — volunteers can expect in return for their service. Refer to the Ministry Position Description.
6. Highlight training that is offered. Both at the parish and through other means.
7. Explain any possible out-of-pocket costs and what, if anything, will be reimbursed.

## **Step 4 - Volunteer Information**

A Volunteer Information form must be completed for all prospective volunteers. (*See Appendix 3*)

The completion of an application form is intended to ensure that adequate records are kept. In addition, as with the use of a ministry position description, asking individuals to complete an application form demonstrates the seriousness of your commitment to screening and provides a paper trail that will protect both the applicant and the parish. Use only the official Diocese of Charlottetown forms.

### **Responsibility for Volunteer Information Forms**

The Parish Volunteer Screening Committee Coordinator is responsible for ensuring that there is an adequate supply of forms for all volunteers.

You may print copies of the forms online from our website or contact us directly.

### **Who will complete a Volunteer Information Form**

All parishioners who are engaged in parish volunteer ministry positions and every parishioner that wishes to volunteer in a parish ministry position must complete a Volunteer Information Form.

### **Incomplete Volunteer Information Forms**

The original printed Form must be complete in its entirety before a person can begin their duties.

### **Actions to be taken**

- The Parish Volunteer Screening Committee will supply the Volunteer Information Form.
- The Parish Volunteer Screening Committee will then collect the Volunteer Information Form and ensure they are appropriately filed.

## **Step 5 - Interview**

An interview may be conducted for high risk ministry positions, if the prospective volunteer is not known to the recruiters or if there are concerns about the ability of the individual to appropriately fulfill the duties of the ministry. Usually the person recruiting for volunteers conducts an interview to determine if the prospective volunteer is prepared and suitable to volunteer in the specific ministry. *(See Appendix 5 for interview guidelines)*

The interviews for individuals not known in the parish or with individuals where there are concerns, will be carried out with at least two interviewers. The interview provides you with an opportunity to talk with the applicant about her/his background: gifts, talents, skills, interests and availability. It also allows an opportunity to explore any concerns you may have about the suitability of this person for the ministry position in question and to ensure there will be a "good fit" between the person and the ministry.

The interview includes questions which are directly related to the specific risk concerns for the position being applied for: i.e. interpersonal style with children or vulnerable adults history working with money, and so on. Notes from the interview will be kept in a secure parish file, administered by the Parish Volunteer Screening Program Coordinator. Use only the official Diocese of Charlottetown forms.

## **Step 6 - Reference Check**

Prospective volunteers in high risk ministries are required to identify two individuals who know him or her well to provide a reference. Family members may not be used to provide a reference.

The prospective volunteer gives the reference form, provided by the parish, to each of the referees and requests that the completed reference form be returned to the chair of the Parish Screening Committee.

The Parish Screening Committee is responsible to review references. If there are any concerns identified in the references, the Screening Committee shall clarify the concerns with the person providing the reference. Additional references may be requested, if necessary.

The Parish Screening Committee may consult with the Pastor, who can provide guidance and support. Safety and protection of ministry participants, parishioners, general public, and volunteers shall be primary considerations in deciding whether to accept the prospective volunteer into a high risk ministry. The Pastor is responsible for the decision to accept the volunteer or not.

If references are not provided in a timely manner, a request shall be made to have the references forwarded. Substitute references may be requested, if necessary.

**Two** references must be completed for all high risk ministry positions.

It should be made clear to the referee that the individual is being considered for a position of trust i.e. with children, with other vulnerable people, with money, etc. Reference forms must be kept in the volunteer's file.

A reference check may be the most effective screening step during the selection process. References will confirm the background, gifts, talents and skills of the applicant and will provide an outside opinion on the suitability of the person for the ministry. The official Diocese of Charlottetown forms should be used.

*(See Appendix 6 for Reference Forms)*

### **Responsibility for Reference Checking**

The Parish Volunteer Screening Committee is responsible for checking references.

### **Unresponsive Reference**

In the event that an applicant's reference is unresponsive within a suitable time frame, the applicant should be notified of the difficulty and asked to provide substitute references.

### **Written, Telephone, E-Mail References**

Reference letters must be written using the Diocese of Charlottetown form. Telephone reference checks may be adequate, using the Diocese of Charlottetown "Reference Form" provided. Avoid E-mail reference checking since confidentiality cannot be assured.

#### **Action to be taken**

- Enter the person's name, the parish name, the title and the responsibilities for the ministry positions involved on the reference letter.
- Give them to the volunteer to give to the reference (include a self-address envelope if possible), or conduct phone interviews.
- Keep track of returned forms, read them and ensure they are filed.

#### **What to do When You Get a Negative Reference**

- Contact the reference who identified concerns and clarify the concerns identified and assess the impact on the prospective volunteer's ability to function as a volunteer: safety and security of program participants and the general public are to be considered.
- Request additional references from the prospective volunteer.
- Inform the Pastor.

#### **"Dos" of Reference Checking**

- Maintain confidentiality of the references' comments: this information may only be discussed with the Pastor.
- Check all references! READ all references!

#### **"Don'ts" of Reference Checking**

- Don't proceed with reference checks until you have consent.
- Don't make exceptions for anyone.

## **Step 7 — Criminal Record Check**

All prospective volunteers are required to provide a vulnerable sector criminal record check (CRC) before being approved as a volunteer in a high risk ministry.

Criminal Record Checks that have been issued by the relevant police agency within the previous six months may be accepted; if there is reason to believe a more recent criminal charge or conviction has occurred, a more recent CRC may be requested.

The original CRC issued by the police agency must be provided. If the prospective volunteer wishes to retain the original document, a true “copy” of the document may be accepted, with the Pastor signing and dating the “copy” and noting that the copy is an exact copy of the original document.

Criminal Record Checks shall be retained on file for seven years after the volunteer completes their role as a volunteer in a high risk ministry, in the event an allegation is made against the volunteer in the future.

The roles of the various participants in the screening process are outlined below:

### **Parish Screening Committee's Role**

- To determine the risk potential for each ministry,
- To distribute a letter of reference from the parish, needed for a Vulnerable Sector Criminal Record Check, to prospective volunteers,
- To explain to volunteers the reasons for a Criminal Record Check,
- Inform the Pastor which prospective volunteers will be submitting criminal record checks and,
- To provide the Pastor with the appropriate and necessary information he will need to make decisions concerning a particular volunteer.

### **Pastor's Role**

- To support and assist, when and where necessary, the Parish (Pastoral Unit) Screening Committee when a Criminal Record Check has been requested for a particular volunteer,



- To provide a letter of reference from the parish to parish volunteers and parish paid employees who require a Criminal Record Check, (Refer to Appendix 7)
- To respond to Criminal Record Check reports that have been returned:
  - a) If there is no conviction(s):
    - i. Notify the Parish Screening Committee that they may continue with the Screening process (Do not reveal anything regarding the content of the Criminal Record Check Report), and
    - ii. Secure the CRC report and handle it as directed by the "Pastor's Tasks" of the Strengthening the Caring Community Guidelines.
  - b) If there is a conviction(s):
    - i. Contact the Diocesan Pastoral Centre for a consultation regarding the nature of the conviction and the suitability of this person for the volunteer ministry position for which they are volunteering, and/or
    - ii. Speak with the person about her/his conviction(s).
    - iii. Pastorally deal with any volunteer whose CRC result is positive. For example, direct them to another area of ministry for which they might be suited and which does not have a high risk potential.
    - iv. Based on your conversation with the person and/or your consultation with the Diocesan Pastoral Centre, make a decision to accept the volunteer or not. (Remember, a person who has a conviction is not automatically excluded from participating in a high risk ministry. The nature of the conviction and the type of ministry has to be considered and the ongoing safety of parishioners and others is to be given utmost consideration.)
    - v. Notify the Committee whether they may continue screening the person (Do not reveal anything regarding the content of the CRC Report)
    - vi. Secure the Criminal Record Check Report and handle it as directed by the "Pastor's Tasks" of the Strengthening the Caring Community Guidelines
- If no vulnerable sector criminal record check is provided in a timely manner, the Pastor shall inform the Parish Screening Committee that no criminal record check has been provided and that the individual shall not serve as a volunteer in a high risk ministry until that is done.
- The Pastor shall ensure the prospective volunteer is informed that he or she cannot be approved as a volunteer in a high risk ministry until a current one is provided.

### **Role of the Diocese of Charlottetown**

- To provide training/information/supplies to the Parish Screening Committee in order that they may be in a position to satisfactorily carry out their responsibility in conducting the

screening process for all volunteers and paid employees

- To provide a letter of reference from the Diocese, to accompany the Consent for a Criminal Record Check form, for each paid diocesan employee or volunteer
- To provide follow-up support to the Parish Screening Committee and to obtain and secure in a safe place **ALL** completed Police Check Information forms from the parishes, for further reference if and when needed

### **Responsibility of the volunteer applying for a police check**

- It is requested that **ALL** those seeking a Criminal Record Check complete the appropriate forms at the office of the respective policy agency.
- With that in mind, it is then the responsibility, once informed, of the individual volunteer to present him/herself at the respective policy agency.

If an existing volunteer is charged with, or convicted of, a criminal offence after beginning to serve in a high risk ministry, the volunteer is required to advise their Pastor immediately. Based upon the nature of the charge or conviction and the risk to others, the Pastor ( in consultation with the Parish Screening Committee and the Diocesan Misconduct Committee), will determine if the individual will be permitted to continue to serve as a volunteer.

The Pastor shall ensure that the volunteer is informed if he or she is permitted to continue in the volunteer capacity. Until the matter is reviewed and a decision is made, it would be best that the volunteer be informed that he or she is not to serve as a volunteer until the matter is reviewed and the final decision made.

If a volunteer plans to continue in a high risk ministry beyond six years, the volunteer is required to provide a current vulnerable sector criminal record six years after beginning in a high risk ministry. In summary, updated criminal record checks need to be provided after six years for the volunteer to continue in a high risk ministry.

The criminal record check signals, in a very public way, our concern about the safety of our people. The candidate will be asked to provide a copy of her/his police report. If any conviction appears, the candidate will be asked to provide details and give permission for the Pastor to confirm their nature with the police. It is not only important to know if someone has been convicted of a crime, but also to know the nature and severity of the crime.

### **The Limitations of Criminal Record Checks**

- The report is only good up to the checking day.
- A recent conviction may not show yet.
- There are time lags in sending records from one country to another.
- The individual may be using an alias so only fingerprint checks will be accurate.

- The person may have obtained a "pardon" and therefore is no longer on the list. or
- The person may never have been caught!

*(See Appendix 7 for additional information on procedures for obtaining a criminal record check.)*

## **Step 8 - Decision to Accept Volunteer**

The Parish Screening Committee is responsible to review reference letters. If concerns have been identified during references, the Committee shall discuss the concerns with the Pastor and conduct additional references, if required.

The Pastor makes the decision to accept the volunteer or not, based upon information provided by references, interviews (if conducted), and criminal record checks. A primary concern of the Pastor, in making this decision, shall be the safety of those served by volunteers and the general public.

Factors that could indicate that an individual should not be approved as a volunteer include:

- They pose a danger to others.
- They are not able to dedicate the necessary time commitment.
- They do not have the skills to carry out the responsibilities as outlined in the Ministry Position Description.
- Other Ministry Position Description requirements cannot be met.
- The Pastor has some information that would prevent the applicant from participating.
- The information that a volunteer applicant has been rejected must not be made public.

The Pastor has the authority to accept or not accept the individual as a volunteer.

The Pastor is responsible to ensure the Parish Screening Committee, the Ministry Coordinator, and the prospective volunteer are informed of the decision to accept the volunteer or not.

## **Notifying An Unsuccessful Volunteer Applicant**

When a person is believed to be unsuitable for the position for which they applied, this information must never be made public; this information is CONFIDENTIAL. Report your findings only to the Pastor and provide him with the relevant information needed.

- When you feel you have an inappropriate candidate, assess the reasons for your reaction. Is there a clear lack of qualifications or is there something less tangible that is making you cautious? Just as in the hiring of employees, when screening volunteers all the techniques of personnel management should be used.

- The potential need to turn someone down is why it is so important to make it clear as you recruit that candidates must undergo the entire screening process. It is so much harder to turn someone down if you have implied that everyone will be accepted.
- The Pastor is responsible to ensure that the applicant is informed that he or she is not accepted as a volunteer.
- Prior to calling an unsuccessful applicant, review the interview notes for their positive qualifications as well as those areas, which needed further development. Avoid giving negative feedback especially if you are not asked for feedback, but do find a positive way to make your suggestion if it is appropriate.
- It is vital, however, not to evade turning someone down by saying "we'll call you" and then not doing so. If you must turn any applicants down, be clear about it. You can still be supportive in their search for the right volunteer placement for them. There may well be general risk ministry positions that would work for this person.
- Often, when a parish develops the reputation of setting standards and not accepting every candidate who wishes to volunteer, you make being *accepted* to serve others as a gift and privilege. This is a big boost to your ongoing recruitment efforts!

## **Step 9 - Orientation and Training**

Appropriate orientation and training will be provided for all ministry positions, along with a copy of Guidelines for Parish Volunteers. (*See Appendix 9*)

After the volunteer is approved, the Ministry Coordinator will arrange for the volunteer to review and sign the Volunteer Statement form ( Refer to Appendix 4). The form is to be filed in the volunteer's file.

In fairness to volunteers, it is essential that orientation and training be provided to ensure that the individual is able to perform her/his ministry effectively. Training should be done before the person starts and whenever there are any changes in the ministry.

Applicants are required to sign the back of their volunteer information form stating that they have read the position description and the screening policy and that they understand and will comply with them. Use only the official Diocese of Charlottetown form.

In fairness to volunteers, it is essential that orientation and training be provided to all volunteers to ensure that the individual is able to perform her/his ministry effectively. This will give confidence to the person undertaking the task and maintain a high level of service to the community.

The Ministry Coordinator/Leader should review the Guidelines for Parish Volunteers Booklet with each volunteer. The Parish Volunteer Screening Committee Coordinator is responsible for ensuring that there is an adequate supply of booklets for all volunteers.

### **Step 10 – Supervision**

All ministry positions will be appropriately supervised.

The intensity and nature of the supervision will vary with the risk involved in the position. The primary function of the supervisor is to ensure that services within a specific ministry are provided in a professional and safe manner and that volunteers have a contact to seek guidance, as required.

Normally, the Ministry Coordinator would serve as the supervisor of volunteers in a specific ministry. As supervisor, the individual would provide guidance, as required, on issues related to the ministry. The supervisor would be available to volunteers and to parish members to respond to issues that might arise. The supervisor may consult with the Pastor on issues, as required.

## **Reporting of Abuse or Inappropriate Behaviour**

In the case of the discovery of abuse by or against a volunteer, the person who has uncovered this information has the responsibility to report it in the following manner:

### **A child under the age of 18 years:**

1. If a person has knowledge or reasonable grounds to suspect that a child is in need of protection, they must report this to Child and Family Services personally and immediately. They are not to pass the information to the Pastor with the expectation that he will report it.
  
2. Call one of the Child Abuse Reporting numbers: 1-877-341-3101 during the day or 1-800-341-6868 after hours to report the concerns.

Child Protection Act R.S.P.E.I. 1988, Cap. C-5.1.

MANDATORY REPORTING Section 10

(1) Notwithstanding any other Act, every person who has knowledge, or has reasonable grounds to suspect that a child is in need of protection shall (a) without delay, report or cause to be reported the circumstances to the Director or to a peace officer who shall report the information to the Director and (b) provide to the Director such additional information as is known or available to the person.

(2) subsection (1) applies notwithstanding the confidential nature of the information on which the report is based, but

nothing in this section abrogates any solicitor-client privilege.

(3) Subject to subsection (5), no person shall reveal or be compelled to reveal the identity of a person who has made a report or provided information respecting a child pursuant to subsection (1).

(4) Subject to subsection (5), a person who makes a report or provides information pursuant to subsection (1) or who does anything to assist in an investigation carried out by the Director, is not liable to any civil action in respect of providing such information or action.

(5) Subsections (3) and (4) do not apply where a person knowingly makes a report or provides information which is false or misleading. 2000 (2<sup>nd</sup>), c.3, s.22; 2010, c.28, s.11.

3. Contact the Pastor to update him on the situation. The Pastor will check with Family and Child Services at the above phone number to determine if he should contact the volunteer to ask them not to participate in any further volunteer activities. It is important that the Pastor not interfere with the investigation being conducted by Child and Family Services and/or the Police. The Pastor will then notify the Chancellor of the Diocese who will immediately notify the Chair of the Diocesan Misconduct Committee.

notify

#### **A Person Eighteen years of Age or Older:**

1. Contact the Pastor to update him on the situation. He will, in turn, notify the Chancellor of the Diocese who will immediately notify the chair of the Diocesan Misconduct Committee.
2. If it appears that a criminal offence may have occurred, the Pastor will consider contacting Police for an investigation of the matter.

If the matter is referred to the Police, the Pastor should discuss with Police, whether the Pastor should contact the volunteer to inform them that they are not to continue in the volunteer role until the Police complete their investigation. The Pastor is to work in partnership with the Police to ensure safety of all concerned. After discussion with Police on the timing, the Pastor will notify the volunteer that he or she is to immediately withdraw from her/his ministry until further notice. Once the matter is reviewed, a decision will be made whether to allow the volunteer to continue in the volunteer role. The Pastor will ensure that the volunteer is duly informed.

#### **Documentation of Suspected Abuse/Inappropriate Conduct:**

1. Document all statements, conversations and observations as soon as possible. Keep these documents strictly confidential. The notes may be used to provide information to the Pastor or Child and Family Services and/or Police, if they are involved.

Notes should include: dates, times, name of persons involved, locations, and a clear and complete summary of the incident(s).

## **Confidentiality**

All information gathered either in writing or verbally must always be kept in the strictest of confidences in all circumstances except when;

- a person threatens suicide
- a minor (18 and under) reports physical or sexual abuse (there is a legal requirement to report this to Child and Family Services)
- someone's life is in danger
- any person's physical wellbeing is threatened (including your own)
- someone exhibits psychotic behaviour
- a situation occurs that is beyond your own experience and expertise.

In these situations it is appropriate for volunteers or parishioners to share the information with a Parish Volunteer Screening Committee Member and always notify the Pastor.

The information gathered for the purposes of screening will be accessible only to the volunteer applicant and to the Parish Volunteer Screening Committee Members and the Pastor.

Confidentiality is a serious issue. We must be aware of the potential legal liability if information about someone is made public. Even if something that is written or said is true, telling it to others



or allowing them to see something written may still constitute an invasion of privacy, which might also give rise to a lawsuit.

All volunteers have the right to expect that any personal information will be kept confidential. It is important that these guidelines on the maintenance and confidentiality of records be explained to all volunteers and volunteer applicants so that they know who has access to their information. It should be made clear to them that they can examine their file at any time and may insert documentation of their own if they so desire (such as certificates and awards) however, the file remains the property of the parish.

## Record Keeping Protocol

### High Risk Volunteer Files must contain:

### General Risk Volunteer Files must contain:

<ul style="list-style-type: none"> <li>• Volunteer Information Form</li> <li>• Ministry Position Description or list of Ministries involved in Ministries involved in</li> <li>• Interview Notes, <b>as required</b></li> <li>• Reference Forms (three)</li> <li>• Envelope (sealed, marked 'confidential' and signed by the Pastor) containing the Criminal Record Check</li> <li>• Yearly Self-Review &amp; Participant Follow up</li> <li>• Any Letters of Praise/Appreciation, Awards, Certificates of Training, etc. that the volunteer may want added.</li> </ul>	<ul style="list-style-type: none"> <li>• Volunteer Information Form</li> <li>• Ministry Position Description or list of Ministries involved in Ministries involved in</li> <li>• Any Letters of Praise/Appreciation, Awards, Certificates of Training, etc. that the volunteer may want added.</li> </ul>
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Files are to be kept in a locked and secure filing system on Parish property, the files must be alphabetical by last name and clearly labeled. Mark the High Risk files so that they stand-out for easy recovery.

Criminal Record Check Reports: The pastor is the only person who will handle Criminal Record findings. To ensure that no one else has access to this document, the pastor will put the findings in an envelope, seal the envelope and sign the seal of the envelope. This is placed in the volunteer's secure file.

## How long must files be kept?

All files will be kept and updated while the volunteer is in a ministry position at the Parish. For legal reasons data on screening and ongoing service should be kept on file at the Parish for seven (7) years after a person has ceased her or his ministry and then sent to the Diocesan Pastoral Centre to be archived.

## **Transfer/Move to New Parish Procedures**

If a volunteer moves and would like to volunteer at another Parish within the Diocese of Charlottetown the new Parish will screen the volunteer as appropriate. A reference is asked from their former Pastor to the new Pastor stating that the volunteer left the Parish in good standing and the new Pastor may also request a copy of the volunteer file to assist with the new Parish's screening process.