



## VOLUNTEER POLICIES, PROCEDURES & SCREENING MANUAL

*Through the Sacrament of Baptism, we are called to share our gifts with one another and with the world. Given the importance of this call from God, it is essential that we, as a community, do all we can to assure that the right gifts are shared in the right way, at the right time, by the right people. We fulfill our mission more effectively when we make every effort to ensure a richer, stronger, more vibrant and safer community of faith.*

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**STRENGTHENING OUR PARISH COMMUNITIES** is a core standard of care embraced by all clergy, religious orders of clerics, sisters and brothers, employees and volunteers working in the parishes and ministries of the Diocese of Calgary. The core standard of care involves policies and procedures designed to create and maintain a safe environment in our parishes and programs. It also includes a Model Code of Conduct that must be embraced by all those who make up the personnel of the Diocese. This core standard of care includes assessing all activities in parishes and ministries of the Diocese to identifying all positions especially those which could put children, youth or other vulnerable persons at risk of being harmed. The goal at all times is the protection and safety of our children, our vulnerable people, our volunteers, our clergy, religious, employees and our Church. Thus, it is a permanent policy of the Roman Catholic Diocese of Calgary that all positions are assessed, assigned appropriate risk levels and that appropriate screening and management practices are maintained consistently throughout the Diocese.

### ***Acknowledgment***

This manual was prepared by the RC Diocese of Calgary (Alberta) for the use of all its parishes and programs. A portion of this manual is compiled from the Volunteer Screening Program of the Archdiocese of Toronto. It is to be noted that the RC Diocese of Calgary and the RC Archdiocese of Toronto do not share pastoral responsibilities or duties and are not legally bound to each other. We wish to thank the Archdiocese of Toronto, for their excellent work developing their Volunteer Screening Program and for allowing us to adapt their well thought out and concise resources for our diocese. Acknowledgement and thanks also go out to all those within the RC Diocese of Calgary for lending their hearts and hands to researching, compiling, revising, reviewing, and vetting the documents that make up the Volunteer Screening Program for the RC Diocese of Calgary. The documents in the Strengthening our Parish Communities Volunteer Screening Policies and Procedures are works in progress and are therefore subject to change.

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## *The Church at Work*

The Church at work calls clergy and laity to respond actively and cooperatively to the challenges of life in Christ. In the Dogmatic Constitution of the Church, *Lumen Gentium*, there is a call to all who are baptized in Christ to cooperate in the “common understanding with one mind.”

We are committed, as a Christian community, to declaring and safeguarding the dignity of each person. The Church has consistently affirmed that dignity by recognizing the value and the worth of work. Pope John Paul II writes in the Encyclical *Laborem Exercens*

*“Work is a fundamental dimension of human existence on earth...the basis for determining the value of work is not primarily the work being done but the fact that one doing it is a person. However true it may be that the human person is...destined for work and called to it, in the first place, work is ‘for persons’ and not ‘persons for work.’”*

The Diocese of Calgary, and by extension, its parishes, strives to create and maintain a just work environment that encourages and supports all its employees in sharing the mission of the Church to grow in awareness of the presence of the Kingdom of God.

The Diocese of Calgary values its most important resources its employees and volunteers. It is important that they recognize and appreciate the talents and skills that everyone brings to our workplaces. Further, it is essential that volunteers communicate regularly and effectively with one another to ensure the vitality of our parishes and Diocese.

## *Ministering & Volunteering in the Roman Catholic Diocese of Calgary*

Every organization has a responsibility, which is at once moral, spiritual and legal. This is not only the right thing to do but it is legally required under the concept of “Duty of Care”. **Duty of Care** is a legal principle that identifies the obligations of individuals and organizations to take reasonable measures to care for and protect those who participate in their programs.

It is impossible to anticipate every possible ministry or volunteer position in every parish and program in the Diocese. Moreover, an authentic expression of Catholic stewardship must reflect the unique combination of gifts and charisms that makes up a parish community, and not impart a generic recipe for stewardship behaviour. Who we are is a community of individuals made in the image and likeness of God. Therefore, the Trinity is for us all the ultimate model of ministry. The U.S. Bishop’s Pastoral Letter on stewardship states: God wishes human beings to be His collaborators in the work of creation, redemption, and sanctification (Stewardship: A Disciple’s Response, 25).

In the spirit of stewardship and Strengthening our Parish Communities, the Diocese provides leadership and resources to its parishes and programs.

The resources listed below are intended to ensure a consistent standard of care for parish communities when discerning their collaboration with God as stewards of the mystery of salvation. All of these documents are available on the Diocesan website [www.calgarydiocese.ca](http://www.calgarydiocese.ca)

- **VOLUNTEER POLICIES, PROCEDURES & SCREENING MANUAL** is designed for the use of Pastors, Parish Volunteer Screening Coordinators/Committees, Parish community leaders, volunteers, parishioners, participants, clients and all members of the various Parish communities of the Diocese of Calgary. It contains volunteer policies developed with a view to creating safe and caring environments for all who are serving and being served in this Diocese. The resources provide step-by-step instructions for those responsible for assessing volunteer/ministry positions and for conducting appropriate screening procedures. An appendix provides forms and templates for the variety of documents required for screening volunteers.
- **MODEL CODE OF CONDUCT** includes definitions, and standards of conduct and reporting procedures to which all clergy, religious orders of clerics, brothers and sisters, employees and volunteers must agree to in order to provide services in this diocese.
- **SAMPLE MINISTRY POSITION DESCRIPTION** provides a template for creating parish ministry positions.

## *Diocesan Ministries in Support of Parish Life*

The Diocese of Calgary offers support and resources to parishes through its ministry offices. The Directors and Coordinators work closely with parishes and parishioners in support of ministry at the parish level.

The Ministries operating out of the Catholic Pastoral Centre that offer significant support and guidance to parishes specifically in the area of ministry service within the Church and Diocesan activities are listed below. For up-to-date information about these ministries and the services and support they provide for parishes, please visit their web-pages on the Diocese Website at [www.calgarydiocese.ca](http://www.calgarydiocese.ca)

- Health Care
- Ecumenical & Inter-Religious Affairs
- Library and Archives
- Life and Family Office
- Liturgy
- Mission Council
- Religious Education
- Social Justice
- Stewardship
- Together In Action
- Youth Ministry

## I. VOLUNTEER POLICIES & PROCEDURES

### 1. *Model Code of Conduct*

To ensure the highest standard of safety for all in our community and to provide for the effective and efficient operation of the Diocese, its parishes, ministries and programs all personnel (including clergy; religious orders of clerics, brothers and sisters; employees and volunteers) must maintain the highest traditions of service.

**All Personnel must agree to the Model Code of Conduct** (*See Appendix 1 for Model Code of Conduct*)

### 2. *When Working With Minors/Vulnerable Persons: General Guidelines for Volunteers*

The following guidelines are intended to provide a general overview of how interaction should occur. All programming that involves minors/vulnerable people must include a Two Adult Rule. The two-adult rule requires that there must always be two non-related adults present when providing services or supervising one or more minors/vulnerable people. This rule is designed for the safety of volunteers as well as clients.

It is recognized that unforeseen circumstances can and will occur. The important safeguard for our children is full disclosure. If an adult finds him or herself alone with a child for any significant amount of time, or in a situation of emotional intensity, every effort should be made to find another adult and to inform the child's parent or guardian as quickly as possible under the circumstances.

- Supervising volunteers must have access to up-to-date emergency contact phone numbers.
- Volunteers over 16 years of age should not spend extended time alone with children or vulnerable adults without consent of the child's guardian and the knowledge of the ministry leader/supervisor.
- When programming requires potentially intimate settings (overnight camps for example) every effort must be made to protect privacy. Girls and boys must not change together and adults must change separately from the children. Adults should not sleep in proximity to children.
- Adults who form a relationship with children through Church activities should not seek out opportunities to spend time with the child "off site". If off site interactions must occur, the Ministry Coordinator/Leader should be informed as to the reasons and the parent(s)/guardian(s) must be in agreement.
- Adults should not help children with toileting. For younger children who cannot manage alone, parent/guardian permission must be given before toileting or changing help is permitted.

- Children should not be taken in an adult’s vehicle without parent/guardian permission, the knowledge of the Ministry Coordinator/Leader and the appropriate clearance (*see driver section*).
- Physical contact between adults and children should occur in “public” and be sanctioned by the Ministry Coordinator/Leader and the parent/guardian.
- Parents/guardians of children enrolled in programs should be encouraged to ask questions and stay abreast of the nature of the adult/child interaction. Where they feel comfortable they should be encouraged to talk with their children about the programs and the volunteers and staff they encounter.
- Volunteers should not spend extended time alone with vulnerable participants without consent and knowledge of the Ministry Coordinator/Leader and the authorization of the parent/guardian.
- Volunteers should not take others in their vehicle without getting appropriate clearance (*see driver section*)
- Physical contact between adults should occur in “public” and be sanctioned by the Ministry.
- Volunteers should not take any money or property from a participant for their volunteer ministry.
- Volunteers must not act outside the set boundaries of the Ministry Position Description

### **3. *Volunteer Drivers***

In addition to the Volunteer Information Form and Reference Form, Volunteer Drivers must:

- Complete the Volunteer Driver form
- Be a minimum of 19 years of age
- Have \$2,000,000 of liability insurance
- Provide a suitable Drivers Abstract

*(See Appendix 2 for the Volunteer Driver Authorization Application form)*

### **4. *Travel Within and Outside the Diocese***

This section refers to the Diocesan Parish Regulations and the Release of Liability, Waiver of Claims, Assumption of Risk and Indemnity Agreement

*(See Appendix 3 for these Diocesan Policies)*

### **5. *Internet and Email Use***

When volunteers are selected to assist with parish office functions, they may require access to parish computers, internet, email functions, etc. If this is the

case, it is imperative that they agree to using these resources appropriately and to abide by the Diocesan Model Code of Conduct as well as by any policies, practices, procedures set out by the parish regarding Internet, Email and computer use.

*(See Appendix 1 Model Code of Conduct for the Internet and Email Use.)*

## **6. *Volunteering with Other Organizations***

Parish volunteers who also volunteer with other organizations, even if it is through their parish and or with related organizations, such as Knights of Columbus, CWL, Society of St. Vincent de Paul, Inn from the Cold, Girl Guides, Boy Scouts, etc. will be responsible for adhering to the volunteer policies of the other organization(s) as well as with those of the parish. If there is a conflict, the more stringent policy should take primacy.

Related organizations utilizing parish volunteers and parish facilities must also have safety policies in place or adopt and abide by the policies of the Diocese and parish.

## **7. *Beware the Copyright Police***

Relatively few of us are aware of the implications of that little phrase “home use only” as it appears on our television screens. In order to use resources so labelled in any place other than a home, it is necessary to have permission from the copyright holder. And, in spite of how it may feel the parish hall is not “home”, this rule applies even if the presentation is for only a handful of people. In fact, showing a “home use only” resource in the empty parish hall is actually breaking copyright law in Canada.

Most of the videos with which we are familiar at adult faith formation meetings or sacramental preparation sessions have been designed specifically for church settings and although often not directly stated, these resources include permission to use the item in public – such as the church hall.

Videos, DVD’s BluRay, etc. marked for “home use only” may be shown publicly if you pay for the license, and this is where it gets complicated. You will need to examine the material to find out which body grants licenses for the copyright holder, usually the production company. There are three main bodies which between them represent most of the videos parishes may be interested in showing.

Contact the Diocesan Library at (403) 218-5510 for further information.

## **8. *Volunteer Records***

Volunteer records are to be considered as personnel records. They include personal information, screening documents, self-reviews, client feedback, correspondence, etc. Police Information Checks are to be kept in the personnel file in a sealed envelope marked ‘**confidential**’ and signed by the pastor across the seal. The renewal date should also be marked on the envelope.

These are critical documents and are the property and responsibility of the parish. Parish administration must work closely with the Parish Volunteer Screening Coordinators and Ministry Leaders to ensure that volunteer records are treated as confidentially and securely as any other staff or clergy record and must be securely stored at the parish.

Anyone responsible for the collection and use of any personnel records must not keep them at home, in their vehicles, on their family computers, or other electronic devices, etc. to which others may have access.

Personnel records must not be disposed of or destroyed without the authority of the appropriate Diocesan office either the Office of the Bishop or the Human Resources Office.

## II. VOLUNTEER SCREENING

### *STEP 1 - Risk Assessment of Parish Ministry Positions*

All positions are examined in the light of relevant factors to determine the degree of risk involved. 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 Low, Medium or High Risk.

When there is doubt as to the degree of risk, a position is categorized as high risk.

**High risk activities** must stop where the risks cannot be mitigated by appropriate screening, commitment to Code of Conduct, use of the Two Adult Rule, and appropriate physical facilities (glass panels, open doors, etc.).

#### *1. The Participant*

The vulnerability of the person(s) served needs to be taken into account. Small children, at risk teens, the physically, socially or psychologically challenged, and the frail seniors are the most vulnerable. A vulnerable adult is someone who does not have full use of her/his faculties or who is experiencing extreme trauma or abuse and is unable to function and reason normally.

*Factors such as the following are taken into consideration:*

- Age
- Emotional distress
- Maturity
- Isolation
- History of abuse
- Language and communication skills
- Disability
- Dependence
- Physical ill health
- Mental ill health
- Current crisis/trauma

## **2. The Setting**

The circumstances of the delivery – alone or with others, in a safe or in a questionable location – needs to be taken into account. Where will the activity take place? In someone’s home, a car, the parish hall, a campsite, in isolation, publicly?

*Factors such as the following are taken into consideration:*

- Does this position require work in an isolated location?
- Does this position require unsupervised contact with a vulnerable participant?
- Might someone else have access to the participant while with this volunteer?
- Does the position involve transportation of vulnerable participants?
- Is there heightened potential for contact with bodily fluids, infectious diseases and illnesses?
- Does the position take place in an intrusive or unsafe environment?

## **3. Intensity of the Activity**

The “perceived authority” of the volunteer delivering the service is vital. The frequency and intimacy of encounters is very important. One-to-one grief counselling is a much more intense activity than the preparation and delivery of Christmas hampers.

*Factors such as the following are taken into consideration:*

- Does the position involve physical contact?
- Does the position involve working with young children in a setting where touching, lifting, toileting, etc. are intrinsic to the position?
- Does the position involve helping participants change clothes, bathe, move around?
- Does the position require physical exertion or endurance, such as helping someone transfer from a wheelchair?
- Does this position involve working with extremely emotional or traumatized participants?
- Is this a position with expected high levels of stress, emotional strain, and burnout?
- Does this position involve access to confidential participant or organizational information?
- Does this position involve handling or managing funds, cheque books or donations?
- Are specific knowledge or skills required to fulfill this position?
- Will staff, volunteer or client typically experience emotional stressors such as loss, grief or bereavement?

#### ***4. The Supervision***

The issue of serious supervision must be considered in determining the level of risk involved in a ministry position.

*Factors such as the following are taken into consideration:*

- How well is the person in this position supervised?
- Does the volunteer have access to their supervisor when needed?
- Is feedback on performance regularly sought and given?
- Are participants consulted regarding the volunteers performance?

***Ratios of Children/Youth/Vulnerable Adults to Leaders***

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Day Programs at the Parish facilities:

Age of Participants	Number of Adults
0 to 8 months	2 unrelated adults to 6 children
18 months to 2 years	2 unrelated adults to 10 children
2 to 5 years	2 unrelated adults to 12 children
5 to 18 years	2 unrelated adults to 15 children
Vulnerable adults	2 unrelated adults to 10 vulnerable adults

Day Excursions and Overnight Outings:

Age of Participants	Day Excursions	Overnight excursions/Activities
5 or under	2 unrelated adults per group of 10 Children	Not recommended
Ages 6 to 8	2 unrelated adults per group of 12 children	Not recommended
Ages 9 to 10	2 unrelated adults per group of 14 children	3 unrelated adults for every 10 children. Must be at least one male and one female per group dynamics
Ages 10 to 14	2 unrelated adults per group of 15 children	3 unrelated adults for every 10 children. Must be at least one male and one female per group dynamics
Ages 15 to 18	2 unrelated adults per group of 15 youth	3 unrelated adults for every 10 youth. Must be at least one male and one female per group dynamics
Vulnerable Adults	2 unrelated adults per 10 vulnerable adults	3 unrelated adults per 10 vulnerable adults. Must be at least one male and one female per group dynamics

*(See Appendix 4 for a Sample Risk Assessment Checklist)*

## ***STEP 2 – Ministry Position Descriptions***

This list represents some possible ministries that a parish may be offering. Each parish responds to the needs of its community with the resources human and other that it is provided. This list is not exhaustive nor will every parish have volunteers in each of these ministries. However, each volunteer position in each parish ministry must have a position description and each position description must be assessed as **Low**, **Medium** or **High** risk and provide the background screening process appropriate for the risk factors. Templates for most of the common volunteer positions are to be used.

*(See Appendix 5 for Templates of most of the common volunteer positions)*

*(See Appendix 6 for a blank template from which other unique ministry position descriptions can be developed)*

Adopt-a-Family Volunteer	Hospitality Volunteers
Adorers	IT maintenance Volunteer
Adult Catholic Education Volunteer	Lectors/Readers/Proclaimers
All Roads Lead Home Volunteer	Legion of Mary Volunteer
Altar Servers	Liturgy Committee Member
Baptismal Prep. Volunteer	Living the Word Fellowship Volunteer
Bereavement Committee Member	Marriage Prep Volunteer
Bible Study Leader	Mission Mexico Volunteer
Building Committee Member	Moms' Group Volunteer
Building Maint. Volunteer	Music Ministry Volunteer
Camp Volunteer	Office Volunteer
Cantors	Parish Council Member
Catechists	Parish Finance Council Member
Children's Liturgy Volunteer	Pastoral Care Volunteer
Choir Member	Prayer Chain Volunteer
Cleaners	Pro Life Volunteer
Collection Counters	RCIA Volunteer
Commentators	Rosary Making/Rosary Guild
Construction Committee	Sacristans/Linens
Development & Peace Volunteer	School Liaison Volunteer
Drivers	Spiritual Advisor
Extra-ordinary Ministers of the Eucharist	Stewardship Committee Members
Finance Council	Sunday School Volunteer
Fire in the Rose	Together in Action Committee Members
Food Bank/Hampers	Ushers
Funeral Catering Volunteer	Vocations Volunteer
Funeral Services Volunteer	Webmaster
Gift Bearers	Youth Groups & Club Volunteer
Grounds Maintenance	
Historian/Librarian	

### ***STEP 3 - Volunteer Recruitment Procedures***

All postings for volunteer positions must indicate that Agreeing to the Diocese Model Code of Conduct and appropriate screening procedures are required elements of the process.

- Identify the work that needs to be done and create the ministry position from one of the templates provided or by using the blank template if a similar position does not already exist
- Plan the best way and place to recruit to inspire and attract the right candidates
- Create a brief posting defining the position and what skills, qualities, time commitment, etc. are required taking the information from the Ministry Position Description.
- Establish the interview panel as per the risk assessment
- Develop appropriate interview questions

### ***STEP 4 - Volunteer Information Form***

Candidates wishing to volunteer at a parish must complete the Volunteer Information Form. Those being considered for positions assessed as Medium or High Risk must also complete the References Form.

*(See Appendix 7 for the Volunteer Information Form and References Form)*

### ***STEP 5 – Interviewing Procedures***

Candidates being considered for high risk ministry positions must be interviewed by 2 parishioners as determined in the recruitment planning.

*(See Appendix 8 for “Interview Helps)*

*(See Appendix 9 for “Sample Interview Questionnaire”)*

- Have at least two appropriate, knowledgeable members of the Parish conduct each interview.
- Develop questions appropriate to the ministry position & divide questions between interviewers
- Have the completed Volunteer Information Form handy.
- Interviews should be conducted at the Parish.
- Establish a safe environment.
- All interviews must be conducted In-Person.
- Explain the interview process to the person.
- Describe the ministry specifically, using the Ministry Position Description.
- Describe the screening procedures that must be conducted for this position.

### **“DOS” & DON’TS OF INTERVIEWING**

- Do maintain confidentiality of the all responses; these may only be discussed with the Pastor.
- Do document the person’s responses at the interview and keep the forms in confidential files.
- Do assure the person that their comments are important in the process.
- Don’t avoid doing an interview for a high risk volunteer ministry position!
- Don’t omit questions because of your own embarrassment.
- Don’t make biased assumptions or rush through an interview.
- Don’t ask questions that breach Human Rights

### **CLOSING THE INTERVIEW**

- Allow the person to ask any questions that might arise for them at the end of the interview.
- Summarize what was discussed.
- Clarify what needs to happen next
- Thank the person for coming in.

### **AFTER THE INTERVIEW**

- After excusing the candidate, discuss the interview and suitability of the potential volunteer with the other interviewer and have interview notes filed.

## ***STEP 6 – Check References***

### **RESPONSIBILITY FOR REFERENCE CHECKING**

- The Parish Volunteer Screening Committee or the interviewers are responsible for checking references.

### **WHICH REFERENCES TO CHECK**

- All parishioners engaged in high risk volunteer ministry positions.

### **THE REFERENCE**

- Three references must be conducted.
- References confirm background, gifts, skills and talents and will provide an outside opinion on the suitability of the person for this particular volunteer ministry position.

### **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, EMAIL REFERENCES**

- Reference letters must be written, using the Roman Catholic Diocese of Calgary forms.
- Telephone reference checks may be adequate, using the forms provided in cases of last resort.
- Avoid Email reference checking since confidentiality cannot be assured.

### **“DOS” & DON'TS OF REFERENCE CHECKING**

- Do maintain confidentiality of the references' comments; this information may only be discussed with the Pastor.
- Do use the official Roman Catholic Diocese of Calgary forms.
- Do check all references! READ all references!
- Don't proceed with reference checks until you have consent.
- Don't make exceptions for anyone.

- Don't minimize the importance of making an informed decision.

**WHAT TO DO WHEN YOU GET A NEGATIVE REFERENCE**

- Request additional references from the parishioner.
- Inform the Pastor.

*(See Appendix 10 for a Sample Reference Check Questionnaire/Letter)*

### ***STEP 7 - Police Information Checks (PICs)***

Given the time and cost of conducting a PIC, it is appropriate that it be conducted at the final stages of the screening process.

All Police Services access the same databases, but the procedures for acquiring a PIC may differ between police services in different municipalities and jurisdictions. The forms used by the Police Services are subject to change and they will only accept the most current form. These forms should be accessed through the appropriate Police Service from the websites or directly from their locations.

- Lethbridge Police Service [www.lethbridgepolice.ca](http://www.lethbridgepolice.ca)
- Medicine Hat Police Service <http://www.medicinehatpolice.com/>
- RCMP [www.rcmp-grc.ca](http://www.rcmp-grc.ca)
- \*Calgary Police Service [www.calgarypolice.ca](http://www.calgarypolice.ca)

\*Please note: Some Calgary parishes have Memorandums of Understanding (MOU) with Calgary Police Service for initiating PICs right at the parish. Some parishes have made similar arrangements with Calgary Police Service for initiating PICs for neighbouring parishes in their quadrant. Parishes are responsible for advising their volunteers of the procedures required to attain a PIC.

### **ACTION TO BE TAKEN**

All parishioners in high risk volunteer ministry positions must have a PIC

The volunteer applicant is required to comply with obtaining the PIC report

A **current and original** PIC report is obtained before the person begins their ministry work and is valid for 5 years

PICs must be the original and will not be shared with other organizations or anyone at the parish other than the Pastor and the Parish Volunteer Screening Coordinator

Parish Volunteer Screening Coordinators are responsible for keeping current information on the details required by local police services for conducting PICs and advising potential volunteers and parish administrative staff on the process

PICS are treated as **highly confidential documents** and are to be reviewed only by the Pastor or the PVSC. Once a clear PIC has been received and, the Pastor/PVSC will:

- Without revealing anything regarding the content of the PIC, notify the Ministry Leader/Coordinator Coordinator whether or not they may continue with the Orientation of the person
- Ensure that no one else has access to this report by putting the PIC in an envelope, seal the envelope and sign the seal of the envelope and mark it “confidential” and record the renewal date on the envelope as well
- Ensure it is filed in the volunteer’s secure personnel file.

### **WHAT TO DO WHEN A PIC INDICATES CONVICTIONS/CHARGES/ETC.**

- The Pastor will speak with the person about the issue and have them attend their local Police Services for further screening and await receipt of a clear report in order to continue in their high risk ministry.
- Once the second report is given to the Pastor from the person and if it comes back Negative then he is to follow the earlier mentioned process. If the report comes back Positive the Pastor will have another conversation with the person and determine whether or not it is relevant to the positioning which they wish to be involved. The Pastor and the person wanting to volunteer may then decide that;
  - the information may prove to be entirely irrelevant to the ministry position
  - or, the volunteer will have a probationary period with close supervision and evaluations will be documented
  - or, an alternate person may need to be found for this particular volunteer ministry position. An appropriate volunteer ministry position may be found for this person

### **DECISIONS ABOUT A PERSON’S SUITABILITY FOR A POSITION WILL BE BASED ON:**

- The nature of the program, activities and services provided
- The character and degree of vulnerability of the participant group served and the duty of care to the participants, volunteers, staff, community and to the Archdiocese
- The relevant ethical, spiritual and legal issues and principles involved
- The potential risks involved in the ministry position that the person wishes to do, based on the nature of the ministry, its activities, the setting and the way in which it is supervised
- The nature of the conviction if there is one and its impact on the parish ministry

applied for

### **IF A VOLUNTEER REFUSES TO OBTAIN A PIC**

- Explain that it is the policy and procedure of the Diocese of Calgary that all volunteers in high risk ministry must obtain a PIC and that it is not a question of their credibility.
- If the volunteer chooses not to obtain a PIC then they will have to volunteer in a different ministry of lower risk.

### **COST OF PICs & VOLUNTARY ORGANIZATION AUTHORIZATION NUMBER (VOAN).**

The Cost of PICs for volunteers varies from one police service to the next. At the time of this writing, a program made available through Volunteer Alberta allows volunteer organizations to process PICs at no charge. This is a time limited program and it may or may not be renewed. In order to apply for a VOAN# through Volunteer Alberta, parishes must submit an application and provide volunteer policies and related materials. The documents and toolkits provided through the Strengthening our Parish Communities are designed to be utilized for just this type of resource. Information about the VOAN program and all the forms are available at <http://voan.volunteeralberta.ab.ca/>

Without a VOAN# some police services provide a reduced rate for volunteers. This also changes from time to time. Check with the police service in your area for any other procedures they may have to reduce the cost of processing PICs.

## ***STEP 8 - Orientation and Training Procedures***

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. This will give confidence to the person undertaking the task and maintain a high level of service to the community.

### **1. Orientation for Parish Volunteers**

All parishioners engaged in a ministry position regardless of risk level must be made aware of the Strengthening Our Parish Communities Volunteer Policies, Procedures and Screening Manual (the Manual) and how to access the information. The materials are on the Diocesan website as public information. They must also receive copies of any documents and agreements relevant to their volunteer position.

The Parish Volunteer Screening Coordinator should review the Manual, the Model Code of Conduct and all relevant documents and required agreements with each volunteer.

The Parish Volunteer Screening Coordinator or Pastor's delegate is responsible for ensuring that there is an adequate supply of printed materials for volunteers.

### **2. Training Information for Volunteers**

Training must be provided for all Volunteer Ministry Positions in order to ensure that volunteers are able to perform their ministry effectively and to be sure that they have been given every opportunity to feel informed and capable of doing their ministry. Training should be done before the person starts and whenever there are any changes in the ministry. Refresher courses should be encouraged.

PVSCs should access Ministries in Support of Parish Life at the Catholic Pastoral Centre for Diocesan standards and any additional resources or guidance such as the following:

- Those more experienced in the ministry in the parish
- Diocesan Offices for example;
  - Office of Youth Ministry (youth and young adult related ministries)
  - Religious Education Secretariat (religious education, Catechetical Certificate Program, Sacramental Preparation Programs, NORE parish and home programs)
  - Life and Family Resources (marriage and family ministries)
  - Office of Liturgy (All liturgical ministries, RCIA, Children's Liturgy)
  - Health Care (visiting the sick in facilities and homes)

## ***STEP 9 – Supervision and Evaluation***

### **SUPERVISION**

The nature of supervision will be more intensive with high risk ministries in order to ensure that people are not left alone in situations that could compromise their integrity. This process is designed to encourage and support the ministry of the volunteer.

#### ***What is involved in Supervision***

This involves the Ministry Coordinator or a more “senior or experienced” person in the ministry spending time with the volunteer as they are doing their ministry. If a volunteer and a participant are usually alone together, it is appropriate and necessary for the Ministry Coordinator to conduct random spot checks by visiting the location where they are together and spending time observing.

It should be made clear when the person joins a ministry that supervision in the form of visits and spot checks would be conducted.

### **REVIEW**

Observations should be systematically recorded using the Self Review for Parish Ministers form to include feedback on gifts, skills, strengths and challenges. By instituting a review process, the volunteer’s ministry service can be observed on an ongoing basis.

#### ***Who Requires Supervision and Review***

- Supervision and Review are required for all volunteer ministry positions.
- High risk ministry volunteers will complete a Self-Review at least once a year.
- Medium and low risk ministry volunteers will complete a Self Review based on the length of their term in the position, to discuss how their ministering has been thus far and to determine if they want to continue with the ministry

#### ***In completing the Self-Review, Volunteers must***

1. Review the Ministry Position Description.
2. Provide any new information regarding address/phone number/emergency contact info if needed.
3. Complete the Self Review for Parish Ministers form.
4. Address areas covered on the Self Review form as clearly and accurately as possible
5. Discuss with her/his Supervisor
6. Have the Supervisor complete the comments area of the Self Review if there are any comments to me made.

***Ministry Leader/Coordinator/Supervisor must;***

1. Ensure that all their Volunteers receive and complete a Self Review form at the proper time.
2. Complete section of the Self Review form designated for them and discuss with volunteer.
3. Give the completed and signed form to the Parish Volunteer Screening Committee Coordinator for filing.
4. Identify for Pastor any areas of concern regarding the ministry or any of the volunteers.

***Parish Volunteer Screening Coordinator;***

1. Ensure that all Ministry Leaders/Coordinators receive and complete a Self Review form at the proper time.
2. Complete the section of the Self Review form designated for them and discuss the review with the Ministry Leaders/Coordinators.
3. File the form appropriately
4. Monitor the schedule to ensure that Ministry Coordinators/Leaders are conducting Reviews for their volunteers at the appropriate time.
5. Supply and file the Self Review forms as appropriate
6. Coordinator with the Pastor their own Self Review

***Pastor must;***

1. Ensure that the Parish Volunteer Screening Coordinator receives and completes a Self Review form at the proper time.
2. Complete the section of the Self Review form designated for them and discuss the review with the volunteer.
3. Have the completed and signed form filed appropriately.

*(See Appendix 11 Self Review Form)*

***STEP 10 - Participant/Client Follow-Up Report***

Regular ongoing contact with vulnerable parishioners and clients is a risk management and screening measure that the Roman Catholic Diocese of Calgary requires for everyone's safety and security.

Volunteer Coordinators or the pastor's delegate will conduct follow-ups with those being served. The frequency will be determined by the Volunteer Screening Committees and be appropriate to work of each parish and program.

*(See Appendix 12 for a Sample Follow up Survey)*

### III. VOLUNTEER OPPORTUNITIES WITH THE DIOCESE

- Parishes (contact your parish directly)
- Diocesan ministries and programs - Volunteer materials, position descriptions and volunteer opportunities for the numerous programs put on through ministries operating out of the Catholic Pastoral Centre are accessed through their web-pages on the Diocesan website [www.calgarydiocese.ca](http://www.calgarydiocese.ca)

### IV. OTHER INFORMATIVE LINKS

Volunteer Alberta – Screening <http://www.volunteeralberta.ab.ca/screening/>

Volunteers and the Law in Alberta <http://www.volunteeralberta.ab.ca/vollaw>

## **V. APPENDICES**

***APPENDIX 1: MODEL CODE OF CONDUCT & AGREEMENT TO ABIDE BY THE MODEL CODE OF CONDUCT***

***APPENDIX 2: VOLUNTEER DRIVER AUTHORIZATION FORM***

***APPENDIX 3: TRAVEL WITHIN AND OUTSIDE THE DIOCESE (DIOCESAN POLICY & REGULATION)***

***APPENDIX 4: SAMPLE RISK ASSESSMENT CHECKLIST***

***APPENDIX 5: MINISTRY POSITION DESCRIPTIONS***

***APPENDIX 6: MINISTRY POSITION DESCRIPTION – BLANK TEMPLATE***

***APPENDIX 7: VOLUNTEER INFORMATION FORM & REFERENCE FORM***

***APPENDIX 8: INTERVIEW TIPS/HINTS***

***APPENDIX 9: INTERVIEW QUESTIONNAIRE***

***APPENDIX 10: REFERENCE CHECK QUESTIONNAIRE***

***APPENDIX 11: SELF REVIEW FORM***

***APPENDIX 12: PARTICIPANT FOLLOW-UP SURVEY***