

# VOLUNTEER ENGAGEMENT POLICIES, PROCEDURES & STANDARDS

## For Volunteer Screening and Management

*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.*

**Revised: April 2023**

**Adopted: DECEMBER 2010**



ROMAN CATHOLIC  
**DIOCESE**  
*of Calgary*

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**STRENGTHENING OUR PARISH COMMUNITIES (SOPC)** was introduced throughout the Diocese of Calgary in 2010 as a program to focus on the engagement of volunteers within Diocesan ministries. It establishes the policies, procedures, and core standards of care that guide employees and volunteers in ministries that serve vulnerable people (minors and vulnerable adults). It also establishes guidelines for risk management in areas where individuals are in positions of “high trust” (i.e., access to confidential records, money, or property). This manual is intended to be used as a resource for those individuals assigned the responsibility for oversight of volunteers and/or volunteer screening within a Parish, the Catholic Pastoral Centre or other diocesan program or service.

The goals of the program are:

- To ensure that we fulfill our Duty of Care and obligation as a faith community.
- To safeguard, in all respects, all of those whom we minister.
- To safeguard Diocese financial and physical resources.
- To support the parishes, employees, and volunteers, and preserve their safety, integrity, and reputation.
- To provide an opportunity for parishioners to share their gifts through volunteering in ministries.

These core standards of care apply to all clergy, religious orders of clerics, sisters and brothers, employees and volunteers working in the parishes, ministries,, and programs of the Diocese of Calgary. Lay Associations providing ministry within the Diocese to vulnerable people (minors and vulnerable adults) are required to have a similar program in place or, in its absence, adhere to the SOPC program of the Diocese.

The standards of care include identifying activities within the Diocese which could put children, youth or other vulnerable adults at risk of being harmed or put other Diocese resources (i.e., financial or physical) at risk. The Diocese of Calgary is committed to ensuring that all positions are assessed and assigned the appropriate risk level 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) to be used in its parishes and the Pastoral Centre. A portion of this manual is compiled from the Volunteer Screening Program of the Archdiocese of Toronto and from the Archdiocese of Edmonton. It is to be noted that the RC Diocese of Calgary and these two Archdioceses; do not share pastoral responsibilities or

duties and are not legally bound to each other. We wish to thank both the Archdiocese of Toronto and the Archdiocese of Edmonton, for their excellent work in 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.

The policies and procedures described in this manual are also in alignment with the best practices of Volunteer Canada, Volunteer Alberta, the Canadian Centre for Child Protection and Public Safety Canada.

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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 the contributions of its employees and volunteers. It is important that we recognize and appreciate the talents and skills that everyone brings to our workplaces. The Diocese is committed to providing volunteer opportunities for its parishioners, young and old, whose hearts lead them to service. The engagement of volunteers should not be viewed as the displacement of paid employees from their positions but rather, as an extension of the work performed by employees. Volunteers and employees are considered to be partners in implementing the mission and programs of the Diocese, with each having equal but complementary roles to play. Employees are encouraged to consider creative ways in which volunteers might be of service within the 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 ministry or volunteer position needed in parishes and program in the Diocese. Catholic stewardship must reflect the unique combination of gifts and charisms that makes up a parish community. As a community, we are individuals made in the image and likeness of God. Therefore, our communities are patterned after the most Holy Trinity, the ultimate model of belonging and 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 for collaborative ministries to thrive in vibrant, respectful, and safe environments.

# *Volunteer Engagement – Policies, Procedures and Standards Manual*

This manual has been designed for the use of Pastors, Ministry leaders and those individuals responsible for volunteer screening in the parishes, the Catholic Pastoral Centre, volunteer 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 those being served in the Diocese. The resources provide step-by-step instructions for assessing volunteer/ministry positions and for conducting appropriate screening procedures. The appendices provide all related policies, forms, and templates for the variety of documents required for screening volunteers.

Those who are responsible for volunteer engagement as well as those who plan and organize activities and events involving minors and/or vulnerable adults need to familiarize themselves with those policies, procedures and standards that apply to their role and ministry.

The policies in this manual apply to all volunteers within the Diocese of Calgary in a parish, the Catholic Pastoral Centre and other diocesan program or service (i.e., Elizabeth House, etc.). When a policy applies to a specific group of volunteers this will be noted within the 'scope' of the policy. Unless otherwise stated, the policy applies to all volunteers.

However, no policy manual can anticipate every circumstance or every question about policy and/or procedure. Questions about any aspect of this manual can be raised with the parish Pastor, individual responsible for volunteer screening, or the Human Resources Office at [humanresources@calgarydiocese.ca](mailto:humanresources@calgarydiocese.ca).

The Diocese, at its own discretion may determine, alter, or modify policies, procedures, benefits, or other statements made in the manual. Notice of changes will be provided through email and the latest version, including updates, will be made available to all employees

# Glossary

Clergy – priests and deacons.

Diocese – refers to the Roman Catholic Diocese of Calgary.

Duty of Care – is the Diocese obligation to take reasonable measures to care for and protect employees, clients, participants, volunteers and the Diocese to an appropriate standard. The appropriate standard of care is dependent on the situation and assessed risk to vulnerable people.

Employee – refers to individuals within the Diocese of Calgary who receive remuneration for their work.

Guideline – a statement by which to determine a course of action. A guideline aims to streamline particular processes according to a set routine or sound practice.

Minor – individual under the age of 18

Personnel – refers to any individual, paid or unpaid, working within the Diocese of Calgary including employees, volunteers, and clergy

Policy – is a statement of intent and is implemented as a procedure or protocol. Policies are promulgated by the Bishop of the Diocese and adherence to policy is mandatory.

Position of Trust/Authority – is someone who has:

- A significant degree of authority or decision-making power over a vulnerable adult; and/or
- Unsupervised access to a vulnerable adult and their property; and/or
- The ability to develop a close, personal relationship with a vulnerable adult; and/or
- Access to financial records; confidential information involving the Diocese, employees, volunteers or parishioners; money or Diocesan property.

Procedure – refers to an established way of doing something based on best practice.

Standard – refers to a minimum level of quality or attainment that is considered acceptable.

Standard of Care – refers to the watchfulness, attention, caution, and prudence that a reasonable person in the circumstances would exercise. If a person's actions do not meet this standard of care, then his/her acts fail to meet the duty of care which all people (supposedly) have towards others. Failure to meet the standard is negligence, and any damages, resulting therefrom may be claimed in a lawsuit by the injured party. (*The Free Dictionary*. Retrieved from <https://legal-dictionary.thefreedictionary.com>).

Volunteer – refers to anyone who without compensation or expectation of compensation performs a task at the direction of and on behalf of the Diocese.

Volunteer Screening Coordinator – individual assigned responsibility within a Parish or the Pastoral Centre for screening volunteers as required under the *Strengthening Our Parish Communities* (SOPC) program.

Vulnerable Adult – those who are not able to defend themselves, protect themselves, or get help for

themselves when injured or emotionally abused. A person may be vulnerable because of a physical condition or illness, such as weakness in an older adult or physical disability, or a mental or emotional condition.

Youth – Individual between the ages of 15 and 18

# Volunteer Screening

## Scope

All parishes, ministries and programs of the Diocese of Calgary that engage volunteers within ministry programs.

## Policy

The Ten (10) Step Volunteer Screening process and procedure must be followed by all parishes, ministries and programs within the Diocese of Calgary when recruiting to fill volunteer roles and screening potential volunteer candidates. The success of the program requires due diligence by everyone responsible for volunteers whether in a parish or at the Pastoral Centre. Consistency in messaging regarding the importance of the program is paramount to its success as is consistency in completing the steps with every volunteer.

## Purpose

Screening practices are ongoing and go beyond the selection process. Screening promotes better volunteer matching, improved quality and safety of programs and reduced risks and liabilities. The process ensures that volunteer involvement is meeting the needs of the ministry and/or program, as well as the population served and the volunteers themselves. In addition, these screening practices play a role in fulfilling the Diocese moral, legal and ethical responsibilities to the people it serves. This includes parishioners, clients, participants, staff, and volunteers. This obligation is even greater when serving vulnerable people, including children, youth, people with disabilities and senior adults.

## Procedure

### STEP 1 – Risk Assessment of Ministry Positions

An assessment of all ministry positions will be completed to determine the level of risk and/or trust associated with the role. This information will dictate the degree of screening required of every individual who serves in the role.

When there is doubt as to the degree of risk, the position will be assessed at the highest level.

In cases where the risks cannot be mitigated by appropriate screening, commitment to the *Code of Pastoral Conduct and Accountability for Volunteers*, change in the physical facilities or other prevention method (i.e., Two Adult Rule), the activity that the position is being assessed for must be stopped until a full evaluation is completed in consultation with the Human Resources Office.

## Process:

Positions will be assessed using the *Risk Assessment Matrix*. The matrix takes into consideration the following:

1. The Participant – the vulnerability of the person(s) served. Young children, at risk teens, the physically, socially, or psychologically challenged, and vulnerable adults (elderly and adults with disabilities) are the most vulnerable.

Factors about the participants to consider are: age, emotional distress, level of maturity, history of abuse, language and communication skills, physical or mental disability, and dependency on others.

2. The Setting – this is the environment in which the activity and/or interaction with others occurs. Questions to ask include:
  - Where will the activity take place (i.e., open space, high visibility, closed door meeting space)?
  - Does the position work in an isolated location?
  - Does the position have any unsupervised contact with a vulnerable adult or limited supervision?
  - Who else might have access to a vulnerable adult while with this volunteer?
  - Does the position involve transportation of vulnerable people/person?
3. The Nature of the Activity – factors to consider include the following:
  - The amount of physical contact the volunteer will have with vulnerable people
  - How much interaction will the volunteer have with a vulnerable adult (limited, constant, one-on-one)?
  - Is the activity conducted in a large group setting?
  - Does the role engage in overnight activities (i.e., retreats, camps)?
  - Does the role involve physical contact with vulnerable people (i.e., changing diapers, toileting of young children, lifting, touching)?
  - Does it involve helping participants change clothes, bathe, or move around?
  - Does the position involve access to confidential information regarding program participants, parishioners, the parish, or the Diocese?
  - Does the position involve handling or managing money or funds, have access to parish/Diocese finances, or donations?
  - Does the position have access to parish facilities or property (i.e., keys, computers)?
4. The Level of Supervision – this refers to the amount of supervision that the volunteer receives in the role.
  - Do they have limited or no supervision by another volunteer or staff member?
  - Are the activities in a location where activities are not observed or monitored?
  - Is feedback provided to the volunteer on a regular basis?
  - Does the volunteer have access to a supervisor when needed?
5. Nature of the Relationship – refers to the “perceived authority” of the volunteer delivering the service. The frequency and intimacy of encounters is very important when determining the level of risk or trust associated with the role.
  - Is the relationship between the volunteer and the participant casual, non-intimate, occurring in brief interactions or over short periods of time?
  - Is the volunteer in a position to exert influence over a vulnerable adult or any other volunteer

- or member of staff?
- Does the position have the ability to develop a close, personal relationship with a vulnerable adult?

## STEP 2 – Development of Position Descriptions

Position descriptions will be developed for all volunteer roles within the Diocese with a copy being provided to volunteers on their first day. The position description will include the primary duties and responsibilities of the role as well as the skills, knowledge, education, and experience required to be successful in the role. Clearly defined duties and responsibilities allow supervisors to hold their volunteers accountable for their performance.

In addition, each description will also include the level of risk assigned to the role based on the completed Risk Assessment (low-high) and the corresponding volunteer screening requirements specific to the role.

The Diocese has developed generic position descriptions for common volunteer roles. This position descriptions can be accessed through our website: <https://www.catholicyc.ca/volunteerscreening.html>.

### Process:

- Determine volunteer positions required for each ministry.
- Volunteers who have not reached the age of 18 must have the written consent of a parent or guardian prior to volunteering. The volunteer services of a minor should be performed in a non-hazardous environment.
- Review existing Diocese volunteer position descriptions (located on Diocese website)
- Create a position description for any roles that are unique using the standard Diocese template.
  - Be specific about duties associated with the position, including key responsibilities and performance criteria.
  - Determine specific qualifications potential volunteers must possess if they wish to work with vulnerable people:
    - ✓ Knowing how to interact with children in a healthy way
    - ✓ Demonstrated skills working with children
    - ✓ Values, attitudes, and beliefs towards working with children that are in line with Catholic beliefs and teachings
    - ✓ Demonstrated knowledge of appropriate and inappropriate behaviour between adults and children.

## STEP 3 – Establish a Recruitment Process

Everyone who applies for a volunteer position in a high risk ministry must be interviewed for the role either by the volunteer screening coordinator or other designate (i.e., ministry coordinator). When the position is to be supervised by someone other than the volunteer screening coordinator, that individual should be involved in the interview.

Those within the Diocese responsible for recruiting and placing volunteers into roles will select the most suitable candidate based on the requirements of the role and will not discriminate against any applicant pursuant to the provisions of the *Alberta Human Rights Act*. However, for certain positions, the Diocese has the right to accept only those volunteers who are practicing Catholics and who live in accordance with the teachings of the Catholic Church.



#### Process:

- Create a brief posting for the role defining the position, its duties, and responsibilities. The position description must also include the skills, qualities, and education required as well as the time commitment. This information should be taken from the Position Description. Post the available position in weekly bulletins and on parish/Diocese websites, giving enough time for all qualified individuals to apply for the opportunity (i.e., minimum one week).

### STEP 4 – Candidate Documents

All candidates wishing to volunteer within the Diocese, regardless of the role, must complete the following documents as part of the application process:

1. *Volunteer Information Form*. Those considering positions assessed as high risk must also include references on their form.
2. *Agreement: Code of Pastoral Conduct and Accountability for Volunteers* (2 page document if low risk Ministry)
3. *Code of Conduct and Accountability for Youth Working with Younger Children* (if applicable)

### STEP 5 – Interviewing Potential Candidates

An interview provides an opportunity to talk with candidates about their skills, interests, qualifications, and personal goals and assists with determining if there is a potential match to the available role. In considering a volunteer for a position, attention shall be paid to the interests and capabilities of the volunteer and to the requirements of the volunteer position. No placement shall be made unless suitability is established from the point of view of the volunteer as well as the requirements of the role. No volunteer should be assigned to a 'make-work' position and no position should be given to an unqualified or uninterested volunteer.

#### Process:

- Prepare a standard set of interview questions for each role
- Candidates being considered for high risk ministry positions must be interviewed by two representatives of the Parish/Diocese (i.e., Pastor and volunteer screening coordinator, ministry coordinator and volunteer screening coordinator)
- Establish a comfortable environment to meet with the candidates
- Explain the interview and selection process
- Describe the position or assignment based on the position description
- Outline the screening process
- Document each candidates' response to the interview questions
- The interviewer must assess the reasons when turning down a candidate when it is clear they are not appropriate for a specific role. If an applicant must be turned down, be clear about the reasons behind the decision. Consider if there is another volunteer opportunity available that they are better suited for. Make sure that there is a number of low risk ministry positions available for volunteers who are not qualified for high risk roles.

### STEP 6 – Check References

References must be checked for all volunteers applying for roles that are considered high risk or assigned a high level of trust due to the nature of the responsibilities (i.e., engaging with vulnerable adults or having access to confidential information, financial records, or diocesan property). All reference checks must be

conducted in accordance with the requirements of the position or assignment and in compliance with relevant legislation including human rights, protection of privacy, and access to information.

**Process:**

- References provided by candidates should have direct knowledge of their performance in the area that they are applying to volunteer. For example, an individual applying to work with children must provide references who can confirm how they relate to children because they have either worked with them in that environment or observed them engaging with children.
- Confirm with the candidate those references that you will be contacting.
- Three reference checks must be conducted for positions assessed as high risk.
- The Diocese Reference Check Questionnaire should be used when confirming the suitability of the candidate for the ministry position.
- If you are unable to obtain references, contact the candidate and ask them to provide substitute references.

**STEP 7 –Police Information Check (PIC), Vulnerable Sector Police Information Checks (VSPIC) and Intervention Record Checks (IRC)**

Only those positions assessed as high risk or having a high level of trust associated with them require a police record check to help assess the suitability of the applicant for the role.

**Police Information Check (PIC)** – required if a volunteer will be working in a position of trust but is not solely responsible for the well-being of vulnerable adults. A volunteer role like this does not necessitate a Vulnerable Sector Police Information Check, but for other risk considerations (i.e., access to financial information, property, cash) it is necessary to conduct one. Police Information Checks include existing criminal convictions, upcoming criminal court appearances, and a scan of the local police records in the jurisdiction in which the applicant resides. They may also include information on alleged crimes in which the person was not charged or convicted.

**Vulnerable Sector Police Information Check (VSPIC)** – required as part of a Police Information Check when a volunteer is responsible for the well-being of children under the age of 18, elderly persons over the age of 65, or people with physical or mental disability (whether temporary or permanent). A VSPIC is also required for volunteers in a position with a significant degree of trust or authority and with unsupervised access to vulnerable adults.

**Intervention Record Check (IRC)** – required for overnight activities (i.e., retreats, camps) involving minors or vulnerable adults. An IRC must be completed on every person aged 18 or older who will be staying overnight during the activity. The IRC determines if an applicant has caused a child to need intervention by Child Intervention Services.

A Vulnerable Sector Police Information Check determines if an applicant is a pardoned sex offender, and it also includes a scan of local and national police databases to ensure that the applicant in no way presents a threat to any vulnerable adult.

**Process:**

- Requests for a candidate to provide a Police Information Check (PIC or VSPIC) should only be made when they are the final candidate for the volunteer role.

- Application process:
  - Volunteers residing in Calgary may apply through the City of Calgary Police Services online ePIC system.
  - Other cities (i.e., Lethbridge and Medicine Hat) will have their own process for application
  - Rural parishes – volunteers can obtain their police check through the local RCMP detachment
- A volunteer letter must be provided to the individual as it will inform Police Services as to the type of Police Information Check required (PIC or VSPIC). The letter must include the following information:
  - Volunteer name;
  - Full name and person requiring the check, parish name, address and phone number;
  - Position that the volunteer will hold and ministry, if applicable; and
  - Verification that the applicant is volunteering and will not receive any remuneration or consideration for their work if the position is not a paid position
  - For positions requiring a VSPIC – the following must also be provided:
    - Which of vulnerable children and/or adults the applicant will be working with explaining why these people are classified as Vulnerable Sector and how the applicant has authority over them.
- The original Police Information Check must be presented to the Parish/Diocese and a record kept in Parish Friendly Solutions. The date on the letter should be used as the ‘Clearance’ date and the ‘Expiry’ date added into the record (5 years from the clearance date).
- The Police Information Check must be obtained prior to the individual starting their volunteer role as these positions are considered high risk/high trust. We must always do our due diligence to mitigate any risks to vulnerable individuals (minors and vulnerable adults) as well as church resources and property.
- A current and original Police Information Check must be provided by individuals in high risk/high trust positions every 5 years.
- When a volunteer moves from a position of low risk to one of high risk, they must obtain the required Police Information Check before engaging in their new role.
- Copies of Police Information Checks and/or the information on them must not be shared with other parishes or organizations without the written consent of the volunteer, with the exception of the Human Resources Office.
- The information shared in a Police Information Check is highly sensitive and must be treated with due care in order to protect the privacy and rights of people who volunteer. They should only be reviewed by the Pastor, Volunteer Screening Coordinator and/or the Human Resources Office.

#### **WHAT TO DO WHEN A PIC INDICATES CONVICTIONS/CHARGES/FURTHER ACTION REQUIRED**

- Occasionally an individual will receive a letter to “attend” from police services. In this case, the individual is required to make an appointment with police services. This request can be due to a variety of reasons (i.e., another person with the same name).
- The Pastor, Volunteer Screening Coordinator or Human Resources representative will speak with the person about the issue and have them attend their local Police Services for further screening and await receipt of the report in order to be placed in their high risk ministry. The individual is under no obligation to provide information if the follow-up request was due to a conviction/charge. However, if they do not or are unwilling to undergo additional screening or provide the Diocese with information on the nature of the conviction/charge their application to volunteer cannot be considered further.
- If the second report comes back Negative the individual continues in the screening process. If the report comes back Positive the Pastor, in consultation with the Human Resource Office, will

determine whether or not the conviction/charge is relevant to the position to which they are applying to volunteer. The decision will be based on the following:

- The character and degree of vulnerability of the participant group served and the duty of care to the participants, volunteers, staff, community, and the Diocese
  - 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; and
  - The nature of the conviction if there is one and its impact on the parish ministry applied for.
- The final decision will be one of the following:
    - The nature of the conviction/charge is such that the individual cannot volunteer in that particular position;
    - The information may prove to be entirely irrelevant to the ministry position; or
    - The volunteer will have a six-month probationary period with close supervision and documented evaluations throughout the probationary period.
  - The cost for volunteers to obtain their VSPIC is to be reimbursed by the Parish/Diocese.
    - Process in parishes:
      - Parish reimburses the volunteer when they submit their original receipt
      - Twice per year (June and December), parishes can submit an invoice to Human Resources to recover the cost of reimbursing their volunteers.

## STEP 8 – Orientation and Training Procedures

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

The individual responsible for orienting and training each volunteer may be different depending on the volunteer role and ministry in which they will be serving. It is important that the individual responsible for supervising the volunteer be involved in their training.

### 1. Orientation of Volunteers

All volunteers must be provided with an onboarding package. The package should be reviewed with the new volunteer prior to them starting in their role and include the following:

- Position Description for their Role
- Code of Pastoral Conduct and Accountability for Volunteers
- Volunteer Agreement
- Confidentiality Agreement for Volunteers (depending on risk level)
- Praesidium Academy Information Guide (depending on risk level)

Volunteers in ministries involving minors and/or vulnerable adults will also receive:

- *Working with Minors and Vulnerable Adults: Standards & Boundaries*

Whenever a volunteer changes their role or assumes additional roles they should be provided with an orientation and training on their new role. Especially in the case where a volunteer moves from a low risk role to one that is considered high risk as the requirements for the role will be different. They must complete the screening requirements assessed for the new role prior to starting in it. Even if they have been volunteering in the parish, they are required to complete the screening process. This includes:

- Interviewing for the new role
- Conducting reference checks if moving from a low risk role to one considered high risk;
- Obtaining a PIC or VSPIC if the new role has been assessed as high risk/high trust

## 2. Training Volunteers

Training must be provided for all volunteer positions to ensure that volunteers are capable of performing the requirements of their role and to be sure that they have been given every opportunity to feel informed. Training should be done before the person starts and whenever there are any changes in the ministry. Training provides an opportunity to reinforce the Diocese mission, goals and inspire volunteers to help achieve them. Other benefits:

- Helps new volunteers get to know the people, the program, and the job quickly and efficiently.
- Establishes that there is a minimum competency that all volunteers are expected to obtain.
- Training teaches them skills that may be helpful to them elsewhere and may help them get a paying job in some cases.
- Training publicly acknowledges a necessary level of proficiency. By training, you are making the statement that the Diocese is professional and capable of doing important work and doing it well.
- Can be used to “weed out” those volunteers who aren’t prepared to make the commitment necessary to ensure that your program is a success.

There are two components to volunteer training.

### 1. Praesidium’s *Sexual Abuse Prevention* training

These online training modules are offered through Praesidium Academy. All high risk volunteers are required to complete the following four modules within thirty (30) days of starting their new role.

- *Meet Sam*
- *It Happened To Me*
- *Keeping Your Church Safe*
- *Your Policies*

Low risk volunteers are required to complete the 4 modules listed above or Praesidium C.A.S.E. program (Creating a Safe Environment) within 1 year of ministry. The C.A.S.E training will occur multiple times in a year. Only trained personnel (determined by the Diocese) will facilitate the C.A.S.E. program.

- Volunteers who will be engaging with children under the age of 18 are required to complete three additional modules:
  - *Duty to Report Mandated Report*

- *Bullying*
- *Social Media*
- Volunteers engaging with vulnerable adults are required to complete two additional modules:
  - *Preventing Elder Abuse and Neglect*
  - *Preventing Abuse Against Adults with Disabilities*
- Volunteers participating in overnight activities (i.e., retreats, camps) involving minors and/or vulnerable adults must complete: *Keeping Your Camp Safe*
- Volunteers participating in Day Camps must complete: *Keeping Your Day Camp Safe*
- All volunteers are required to complete the *Abuse Prevention Refresher* module or an equivalent Praesidium course (as determined by the Diocese) every 2 years.

## 2. Role specific training

Volunteers appreciate the time and effort that goes into an organized and effective training experience. Training on their specific role not only helps to prepare them for their job responsibilities but also makes them feel valued. A great training experience is created by proactively sharing information that will help the volunteer be successful. Consider using one of the two training methods:

- **Buddy System** – the volunteer works with an experienced person at first. The experienced person answers questions and makes suggestions as the new volunteer performs their tasks.
- **Shadowing** – the volunteer watches as the experienced person performs the tasks assigned to the role.

Either method is appropriate for training volunteers. The decision of which to use should be based on the complexity of the role, skills, and knowledge that the volunteer brings to the role and, skills of the individual providing the training.

Additional training and educational opportunities should be made available to volunteers. They should be encouraged to attend any diocesan offered workshops or training relevant to their volunteer role.

## STEP 9 – Supervision and Evaluation

Although volunteers are not paid for their contributions, we must invest time and other resources towards what they do to ensure that they are effective in their contribution to our programs and that they are motivated and feel like they are contributing in a meaningful way.

- Each volunteer who is accepted to a position must have a clearly identified supervisor who is responsible for direct management of that volunteer.
- This supervisor will be responsible for day-to-day management and guidance of the work of the volunteer and will be available to the volunteer for consultation and assistance.
- A volunteer may act as a supervisor of other volunteers, provided that the supervising volunteer is under the direct supervision of a paid staff member.

Supervision is about forming and maintaining relationships. This includes training, coaching, and providing feedback. Those relationships can be characterized by mutual trust, respect and recognition of competency and professionalism. Supervising your volunteers includes the following:

- Honesty – providing your volunteers with clear expectations of their role from the beginning. Provide honest, fair feedback including things they do well and areas they can improve. Address any problematic issues with open discussion. Be authentic and candid in your communications and provide explanations. In the words of Brene Brown, “Clear is Kind”.
- Forward-thinking – making sure volunteers understand the Diocese mission, vision, and values from the outset. Explain where you want the program to go, and the role volunteers play to get there. Continually observe the unique skills each volunteer brings to the program and think about how you can offer them their next goal.
- Collaboration – promoting collaboration between and with your volunteers. Coach them when needed. Delegate responsibilities when you can and promote buy-in by sharing the decision-making on changes that might affect them.
- Inspiring – modeling the behaviours you want to see in your volunteers. Make sure your actions match the steps to accomplish your vision. Set goals with your volunteers and plan to get them there. Make them true contributors to the success of the program.

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

This involves a more “senior or experienced” person in the ministry spending time with the volunteer as they are doing their ministry and observing their interactions with others.

The nature of supervision will be more intensive with high risk ministries involving vulnerable adults. It is our responsibility to ensure that volunteers are not left alone in situations that could compromise their integrity. It is appropriate and necessary for the ministry supervisor to conduct random spot checks by visiting the location where volunteers and participants spend time together.

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

### ***Reviews***

Performance reviews provides volunteers an opportunity to give feedback regarding the program they are involved with and receive feedback on their contribution to ministry. They are also one component of a strong screening process. These get-togethers should be a more informal, friendly, and positive experience for the volunteer. This is an opportunity for you to invest in them by discussing their service and the areas of ministry they are passionate about. Consider reviewing high risk volunteer positions 2-3 times per year.

### ***Procedure:***

1. Supervisor provides the volunteer with a copy of the Volunteer Self Review form and requests that they complete it within a specified period of time (typically one week is sufficient). If you give the volunteer too long, it tends to get lost in the day-to-day tasks.
2. Once completed, the volunteer will provide the supervisor with a copy of the Self-Review as it will form the basis of the discussion with their supervisor.
3. The supervisor completes the section of the Self Review form designated for them.
4. A meeting time will be scheduled with the volunteer to discuss areas of success and challenges.
5. Both the volunteer and supervisor sign the form and provide it to the individual responsible for

maintaining volunteer files.

6. There are times when it becomes apparent that the volunteer is not an appropriate fit for the role, and they may need to be asked to step-down. This should be handled with sensitivity and awareness that the volunteer entered into their role with the best of intentions. If possible, place the volunteer in a role that they are better suited for.

## STEP 10 – Participant/Client Follow-Up Report

It is important that volunteers are aware of any follow-up that is conducted with program or event participants receiving their services as part of the Diocese risk management procedures. Regular contact can be an effective safeguard against potential harm and inappropriate behaviour towards vulnerable adults. Conducting random surveys throughout the program year provides the opportunity to stop inappropriate behaviour quickly. Surveys also provide valuable information on the effectiveness of the program or event as well as whether the program is meeting participants needs and expectations.

For each ministry program or event, it should be determined who will be responsible for requesting program participants complete a Follow-up Survey. That individual will send the survey out to participants and receive the completed forms. They will also be responsible for collating the information in such a way that it is impossible to connect the feedback to the individual participant. Ensuring that the individual responses are held in the strictest of confidence is important to securing honest feedback.

### Related Policies & Applicable Documents:

- *Human Resources – Strengthening Our Parish Communities Policy #810-034; HR Policies, Procedures and Guidelines Manual*
- *Risk Assessment Checklist*
- *Ministry Risk Levels (Diocesan Assessment)*
- *Position Description Template*
- *Volunteer Information Form*
- *Code of Pastoral Conduct & Accountability for Volunteers*
- *Code of Conduct for Youth Working with Younger Children*
- *Interview Questionnaire (High Risk)*
- *Reference Check Questionnaire*
- *Letter Requesting PIC or VSPIC Template*
- *Orientation Checklist (Low Risk, High Risk)*
- *Volunteer Agreement*
- *Confidentiality Agreement*
- *Working with Minors and Vulnerable Adults: Boundaries and Standards*
- *Praesidium Academy Information Guide*
- *Volunteer Self-Review*
- *Participant Follow-Up Survey*



# Code of Conduct and Accountability for Youth Working with Younger Children

## Scope

Volunteers who are under the age of 18 working with younger children.

## Policy

Volunteers under the age of 18 who work in ministries providing service to children younger than themselves must review and agree to adhere to the *Code of Conduct and Accountability for Youth Working with Younger Children*.

## Purpose

To ensure that volunteers who are themselves considered ‘minors’ (17 years of age and younger) are aware of the responsibilities and conduct expected of them when engaging with younger children.

## Procedure

- A copy of the *Code of Conduct and Accountability for Youth Working with Younger Children* must be given to the youth volunteer candidate as part of the screening process.
- The volunteer candidates’ parent/guardian is required to review the *Code of Conduct and Accountability for Youth Working with Younger Children* with the candidate and are required to sign the document along with the candidate.
- The original copy of the document is to be kept in the volunteers file with a copy being provided to the youth volunteer.

## Related Policies & Applicable Documents:

- *Code of Conduct and Accountability for Youth Working with Younger Children*

# Roles & Responsibilities

## Scope

Volunteers, representatives from the Human Resources office, parish and ministry representatives who engage with volunteers.

## Policy

Volunteers, as well as individuals who engage with volunteers, are expected to observe all policies, procedures and standards that apply to volunteer engagement in the Diocese and know the responsibilities assigned to their level of engagement.

## Purpose

Written roles and responsibilities help clearly define the level of accountability for each position participating in the volunteer program.

### Responsibilities:

#### Human Resources Office

- Maintains oversight for the Volunteer Engagement and Strengthening our Parish Communities (SOPC) programs including responsibility for:
  - Policy development and implementation
  - Partnering with staff and supervisors to resolve conflict or performance issues with volunteers
  - Partnering with parish staff and ministry leads to ensure that screening requirements are complete
  - Providing clarification on screening requirements when needed
  - Advising external organizations and lay associations of screening requirements for their activities and events

#### Parish or Ministry

- Responsible for implementing the 10-Step volunteer screening program
- Ensuring that all volunteers are screened according to established policies and procedures
- Retaining all volunteer records in a secure location and locked filing cabinet
- Providing a meaningful orientation for all volunteers that includes a review of policies, procedures, and guidelines
- Providing the Diocese with volunteer screening records if requested

**Volunteers have the right to:**

- Work in a safe and healthy workplace, to know about unsafe work and to refuse unsafe work
- A supportive environment in which to work and contribute
- Have their say about their work and ideas regarding their role or the program in which they are volunteering
- Provide feedback and receive feedback when requested and at regular intervals
- Ask for and receive support from their supervisor when required

**Volunteers have the responsibility to:**

- Act responsibly and with integrity
- Fulfill the duties of the role as defined in the position description, efficiently and effectively
- Respect all policies in place and adhere to the Code of Pastoral Conduct & Accountability for Volunteers
- Notify their supervisor if they are unable to fulfill their duties or will miss a scheduled shift
- Make recommendations and suggestions for change in the program which they volunteer
- Provide the applicable screening documentation (i.e., Police Information Check) and complete all applicable training assigned to their volunteer role (i.e., Sexual Abuse Prevention)

# Volunteer Records

## Scope

Individuals who are responsible for volunteer screening within the Diocese.

## Policy

Volunteer records are highly confidential and are to be kept in a secure, locked filing cabinet with access restricted to the individual responsible for volunteer screening and that individuals' direct supervisor and/or the Human Resources Office.

## Purpose

This policy provides guidelines for the management and disposition of Volunteer Records that are created during the course of volunteer activities, whether paper or electronic.

## Procedure

1. The individual responsible for volunteer screening will ensure all of the required documents are gathered once the screening process is complete and set-up an individual file for the volunteer.
2. Information regarding the volunteer should be held in the 'active' volunteer files until that individual is no longer active. The file will then be moved to the 'inactive' volunteer files area.
3. If a volunteer application is declined, the volunteer documents submitted will be filed in a separate area designated for 'rejected or declined' volunteer applications with notes indicating why the decision was made to not accept the individual in the role which they applied.
4. Volunteer files should be kept for six years after the volunteer is no longer involved. At the end of that time, the record must be destroyed (i.e., shredded).
5. If a Volunteer is moving to a different parish, they can request their volunteer documents from their former parish (including copies of Police Information Checks) be shared with the new parish.

## Guidelines

- There should be three sections of volunteer files:
  - Active Volunteers
  - Inactive Volunteers
  - Rejected or declined volunteers
- Volunteer files will include the following:
  - Volunteer Information Form
  - Volunteer Checklist (Low or High Risk)
  - Reference Checks (if applicable)
  - Volunteer Agreement
  - Confidentiality Agreement

- Agreement to Code of Pastoral Conduct & Accountability
  - Police Information Check or Vulnerable Sector Police Information Check (if applicable)
  - Intervention Record Check (if applicable)
  - Training Records
- Applicants may have access only to materials that they have completed during the application process. Do not share information provided by others with the applicant (i.e., reference checks, interview notes, notes regarding the background check, etc.).

# Volunteer Expenses

## Scope

Individuals volunteering within the Diocese.

## Policy

Volunteers may be eligible for reimbursement of pre-approved, actual out-of-pocket, expenses incurred while engaging in volunteer service for the Diocese.

## Purpose

To ensure that volunteers are aware of reimbursement entitlements based on the work of their volunteer role. The policy establishes procedures for reimbursement of expenses incurred by volunteers that have been pre-approved by their direct supervisor.

## Procedure

- Prior to incurring any expense, the volunteer must obtain approval for reimbursement from their direct supervisor.
- To receive reimbursement, the volunteer must submit a Cheque Request (Volunteer Expense Claim) along with the original receipt(s) to their direct supervisor for approval.
- Reimbursement should be made as soon as possible to the volunteer.
- A volunteer who is required to use their own car may be eligible for reimbursement of their mileage at the current rate established by the Diocesan Finance & Administration Office. A *Mileage Claim* form must be completed and submitted to the volunteers' supervisor for approval prior to reimbursement.

### Related Policies & Applicable Documents:

- *Mileage Claim*
- *Volunteer Expense Claim*

# Employees as Volunteers

## Scope

All individuals considered ‘employees’ of the Diocese whether they work within a parish, at the Pastoral Centre or other diocesan sponsored program for which they are paid.

## Policy

The Diocese encourages employees to volunteer within the parishes or with diocesan programs. However, the employee, in their volunteer capacity, can not assume responsibilities or tasks that are “the same as, similar, or related to” their normal job duties for which they are paid. In addition, volunteer services cannot be provided by the employee during the employee’s normal working hours, even if the duties being performed are dissimilar from the employee’s regular job duties.

## Purpose

This policy provides guidelines for when employees volunteer within the Diocese.

## Procedure

- The onus is on the parish/Diocese to make sure the role available meets the criteria to be considered a volunteer position and cannot be misconstrued as an employee position.
  - A volunteer agreement that clearly indicates that the work being done is unpaid needs to be signed by the employee prior to them starting in their volunteer role.
  - The volunteer should have flexibility in scheduling days and hours worked (although reasonable to establish shared expectations)
  - The role should not be given critical tasks that would otherwise be done by an employee
- When family members of an employee are enrolled as volunteers, caution must be taken if placing them within the same area or under the direct supervision of the employee.

# Volunteer Discipline and Dismissal

## Scope

All volunteers within the Diocese of Calgary.

## Policy

Volunteers who do not adhere to the rules and procedures of the Diocese or who fail to satisfactorily perform their volunteer assignment are subject to corrective action and dismissal depending on the nature of the incident. No volunteer shall be terminated until the volunteer has had an opportunity to discuss the reasons for possible dismissal with their direct supervisor and/or the Human Resources Office.

## Purpose

To ensure that corrective action taken with volunteers and dismissal of volunteers is fair, equitable and reasonable based on the procedures outlined in this policy and the expectations, responsibilities, and consequences of volunteer actions.

## Guidelines

- The following are considered grounds for immediate dismissal:
  - Illegal, violent and/or unsafe acts
  - Theft of property or misuse of volunteer funds, equipment, program participant or parishioner information or materials
  - Being under the influence of alcohol or drugs while performing volunteer duties
  - Any action or behaviour that causes harm to a program participant, parishioner, or employee of the Diocese
  - Disclosure of confidential information
  - Convictions of a criminal offence that undermines a person's suitability for volunteering
  - Provision of false information relevant to a person's volunteering position
  - Use of abusive or offensive language or behaviour
  - Failure to abide by policies and procedures
- In appropriate situations, corrective action may be taken following an evaluation. Examples of corrective action may include the requirement of additional training, re-assignment of a volunteer to a new position that is considered more appropriate, suspension of their volunteer duties, or dismissal from volunteer service depending on the situation.



## Procedure

- Formal Verbal Warning
  - Given if, despite informal discussions or training, the conduct or performance still does not meet acceptable standards.
  - The warning must address the following:
    - Action or behaviour that is not meeting standards
    - Expectations of the volunteer and actions that must be taken in order to meet those expectations
    - Timeframe in which expectations must be met
  - A brief note of the warning should be kept with a copy being provided to the Human Resources Office.
- Written Warning
  - If there is no improvement in standards within the prescribed time, or if a further offence occurs, the volunteer should receive a letter from their supervisor inviting them to attend a further disciplinary meeting.
  - Where a written warning is to be given, the Human Resources Office will work with the Supervisor to write the warning.
- Final Written Warning
  - If the conduct or performance still remains unsatisfactory, or if the misconduct is sufficiently serious to warrant only one written warning, a further disciplinary meeting (where a representative from the Human Resources Office will be present) should be called.
  - If this meeting establishes that there has been a failure to improve or change behaviour, a final written warning will be given to the volunteer.
- Dismissal
  - If the volunteer's conduct or performance still fails to improve after appropriate timelines have been established and not met, or if further serious misconduct occurs, the final stage in the disciplinary process may be instituted and the volunteer dismissed.

# Volunteer Drivers

## Scope

Volunteers whose roles require them to drive program participants or parishioners as well as individuals who may be asked to drive program participants or parishioners on a one-off or occasional basis.

## Policy

Volunteers who agree to use their personal vehicle for transporting program participants, parishioners or others engaged in program support. Volunteer drivers support Diocesan activities including events within the parish/Diocesan community.

## Purpose

The purpose of the policy is to ensure that those volunteers who use their personal vehicles have provided the documents and liability insurance required prior to transporting individuals.

## Guidelines

- Drivers must be a minimum of 19 years of age
- Insurance Information:
  - The Diocese requires that the vehicle owner maintain, at all times, valid automobile **Third Party** Liability Insurance of a minimum of \$2,000,000 in respect of liability for injury or death of any passengers in the vehicle the volunteer driver operates.
  - In the case of an insurance claim (i.e., third-party damage and/or personal injury) the vehicle owner's automobile liability insurance applies **before** that of the Diocese.
  - Additional automobile liability insurance protection is provided under the Diocese's comprehensive general liability insurance policy for authorized drivers transporting parishioners, program participants/clients, and Diocese/parish staff on an approved activity. This insurance is only for an amount in excess of the limit of liability provided by the vehicle owner's liability insurance policy.
  - Damage to any vehicle, including the owner's, is the responsibility of the volunteer driver and not the Diocese/parish.
- Transporting vulnerable adults (minors and/or vulnerable adults)
  - The "two-person" rule applies any time a minor or vulnerable adult is being transported in a personal vehicle by a volunteer. Two, unrelated individuals over the age of 18 must be in the vehicle.
- All volunteer drivers must:
  - Ensure they are fit to drive at all times

- Follow all rules of the road including adhering to speed limits, wearing seat belts, and following diversions
- Follow the accident reporting procedure as set out by the Diocese
- Disclose any information that may impact the decision permitting them to transport individuals (i.e., moving violations, accidents, DUI, restrictions/endorsements on their license, license revoked or suspended)
- All drivers must refrain from:
  - Driving when affected by alcohol, drugs, or medicines
  - Driving when affected by illness
  - Driving when too tired to do so safely
  - Using a mobile phone when driving, including hands-free
- Expenses may be reimbursed (i.e., mileage) depending on the circumstances and approval by the ministry lead. The Volunteer Driver is responsible for obtaining pre-approval for any expenses associated with transporting individuals.

## Procedure

- The Driver must complete a *Volunteer Driver Application & Authorization Form* and submit it to the individual responsible for volunteer screening or ministry lead along with a copy of the following:
  - driver's license
  - vehicle registration
  - proof of \$2,000,000 liability insurance.
- The application will be reviewed and, based on information provided, either approved or denied.
- Copies of all documents are to be kept in the driver's volunteer file.

## Related Policies & Applicable Documents:

- *Volunteer Driver Application & Authorization Form*

# Volunteer Committees

## Scope

Individuals volunteering to participate on either parish or diocesan committees.

## Policy

Volunteer committees will be supported in the Diocese where appropriate and when established according to the guidelines provided in this policy.

## Purpose

Volunteer committees provide advisory/consultative support to programs and services throughout the Diocese. This policy provides guidelines on managing volunteer committees as well as screening requirements for committee members.

### Guidelines:

- Committees can be established at any time within the diocese depending on needs within a parish, the Pastoral Centre or other diocesan program.
- A committee can either be standing or ad hoc. A standing committee is permanent (i.e., Parish Pastoral Council, Parish Finance Council), while an ad hoc committee is temporarily formed to accomplish a specific task (i.e., one-time event or activity).
- Ad Hoc Committees must have terms of reference with the following if applicable:
  - Scope and Purpose
  - Composition of the Committee (number of members, position descriptions)
  - Duties and responsibilities of committee members
  - Budget for any expenses
  - Completion date
- Standing committees must have written “terms of reference” that provide the following:
  - Purpose – what it will do, why it was created
  - Scope – what is in and out of scope
  - Membership – type and number of members, how members are appointed, how the chair/co-chair are appointed, length of term, other committee members roles
  - Authority – the decision-making authority of the committee (decides, approves, recommends, etc.)
  - Meetings – frequency and location, meeting procedures, quorum, details about agendas and minutes (how distributed, who prepares them), communication between meetings
  - How the actions of the committee will be recorded, distributed and followed-up
  - Resources and budget – available resources (people, rooms, equipment, etc.) funds available

- Reporting/Relationship with the ministry being served, the Pastor or other diocesan individual
- Review and evaluation of the committee – state when, how and by whom the committee will be reviewed (i.e., annually, end of project)
- Final decisions regarding programs and services offered within the Diocese as well as financial management remain with the Parish Pastor or other Ministry Lead.
- No person who has a conflict of interest with any activity or program of the Diocese whether personal, philosophical, or financial shall be accepted or serve as a volunteer on committee that is related to their interests.
- Should a committee member accept paid employment with the Diocese, they may be required to step-down from participation on the committee if there is a conflict of interest.

## Procedure

- Prior to forming a committee, it should be determined if the purpose/project/task can be accomplished by one or two people (without a group) or if more individuals should be involved.
- Once the decision has been made to form a committee in support of a program or service, the Terms of Reference should be drafted so that it is clear as to the purpose of the committee and specifics of the committee determined.
- Committee member roles should be posted so that anyone interested in the membership has opportunity to apply.
- Some Parish standing committees (i.e., Parish Pastoral Council, Parish Finance Council) have established Terms of Reference regarding membership, length of term and other conditions which must be adhered to.
- Candidates for committee membership must complete the Volunteer Screening process prior to sitting on the committee (i.e., Volunteer Application Form, PIC/VSPIC as appropriate, Praesidium modules).

## Related Policies & Applicable Documents:

- *Parish Pastoral Council – A Guideline*
- *Diocesan Finance Council and Parish Finance Council Guide*

## Lines of Communication

### Scope

Individuals responsible for volunteer engagement in the Parish or the Pastoral Centre.

### Policy

Volunteers should be included in and have access to all appropriate communications (i.e., memos, materials, meetings) relevant to their volunteer role. They should be familiar with the 'lines of communication' in terms of who and when to contact individuals to obtain information.

### Purpose

The purpose of the policy is to ensure that volunteers have access to information to have the ability to successfully perform their responsibilities and contribute to the overall vision and mission of the Diocese.

### Guidelines

- Primary responsibility for ensuring that the volunteer receives pertinent information rests with the direct supervisor of the volunteer.
- To facilitate the receipt of relevant information, volunteer supervisors should consider including volunteers on information distribution lists that provide information that may impact the work that the volunteer performs.
- The lines of communication should operate in both directions and should exist both formally and informally.
- Volunteers should be consulted regarding decisions which would substantially affect the performance of their duties.

# Programs, Activities, Events and Excursions Involving Minors and/or Vulnerable Adults

## Scope

Employees and volunteers responsible for organizing and/or participating in day-time programs, activities, and events.

## Policy

Individuals responsible for day-time programs, activities, events, and excursions (hereafter referred to as 'activities') involving minors and/or vulnerable adults are responsible for ensuring that all screening requirements are completed by volunteers as well as ensuring that guidelines and requirements are met prior to commencement of the activity.

## Purpose

To ensure a safe environment for minors and/or vulnerable adults who participate in programs, activities, events, and excursions organized by the Parish/Diocese and, to provide consistency across the Diocese in organizing these activities.

## Procedure – All Activities

- All activities must be documented and approved in writing by the Parish Pastor or Diocesan office sponsoring the activity who will ensure that there is an employee or volunteer to lead the activity. The applicable *Request for Approval Form* must be completed prior to the activity and retained in the parish or ministry office.
- The individual assigned responsibility for screening volunteers is required to maintain accurate records of screening requirements and to provide that information to the Diocese if requested. If not specifically requested, the information does not need to be forwarded to the Diocese.
- The appropriate number of employees and/or volunteers will be scheduled to supervise the activity.
- Before the activity, every employee and volunteer aged 18+ must have completed the screening process which includes the appropriate Police Information Check (PIC or VSPIC) and Praesidium Sexual Abuse Prevention Training.
- Supervision of participants should be assigned to adults aged 21 and over with those between 18-20 available as co-supervisors.
- There should not be any unsupervised "free time".
- Parents/guardians will be provided with written information about the activity and are required to sign a *Participant Permission Form, Release of Liability, Waiver of Claims and Indemnity Agreement* and

*Medical Information Form* for their child/youth to participate. These documents are to be kept by the event/activity organizer or lead.

- *Medical Information Forms* should be kept in a readily available area in case of an emergency situation.
- If photos or video are to be taken of the event/activity, a *Photo & Videography Release Form* must be provided to the parent/guardian of the participant and returned prior to the event.
- There should never be one adult alone with minors and/or vulnerable adults. The “two-adult” rule (two, unrelated adults) must always be adhered, and one-on-one interactions reported to a supervisor.
- Bathrooms, locker/change rooms and showers – adult supervisors must remain outside of bathrooms and showers as well as immediate area of the change room but within hearing should a participant require assistance.
- Youth should never be put in charge of supervising other youth or minors participating in the activity and should never be in the bathrooms or changing areas with program participants without an adult supervisor present.
- All staff and volunteers participating in the program must review and sign the agreement to the document *Working with Minors and Vulnerable Adults: Boundaries & Standards* prior to participating in the program.
- Any incident or injury must be reported within 24 hours of its occurrence using an *Incident Report Form*. The original copy of the form should be maintained by the parish or ministry office and a copy sent to Human Resources.
- Notification and permission of a parent/guardian is required prior to any one-to-one meeting with a child/youth (i.e., in a mentoring relationship).
- One-to-one meetings with a minor or vulnerable adult must take place in a public area either inside or outside the office, parish or organization’s facilities, where both individuals can be seen by others (i.e., door open, windows in meeting or office space).
- Anyone working with vulnerable adults is required to wear a name tag.
- No child is to be dropped off or left waiting at a parish activity or program location without two non-related adult supervisors present. Similarly, no vulnerable adult is to be dropped off or left waiting to be picked-up without two non-related adults present.
- Emergency plans should be developed in the case of a missing participant, medical emergency, replacement of a participant or chaperone who cannot continue, etc.
- Permission for “Speakers” must be obtained from the Chancellor’s Office before extending an invitation to the guest speaker. Information can be obtained by emailing the Chancellor’s Office directly or visiting our website <https://www.catholiccycc.ca/outsidesspeakerpermission.html>
- Supervision Minimum Ratios:

0-18 months	2 adults to 6 children
19 months – 2 years	2 adults to 10 children
3 – 5 years	2 adults to 12 children
6 – 14 years	2 adults to 15 children; overnight activity 3 adults



15 – 17 years	2 adults to 15 youth; overnight activity 3 adults
Vulnerable adults 18+	2 adults to 10 vulnerable adults

\*Supervising adults must be unrelated

\*If **all** minors are accompanied by a parent or guardian, the above supervision minimum ratios do not apply

## Activities held off Diocesan/Parish property

- It is recommended that transportation to and from the activity be the responsibility of the participants parent/guardian to drop them off and pick them up at the location of the activity.
- Drivers involved in transportation must complete the *Volunteer Drivers Application & Authorization Form* and meet all of the requirements for volunteer drivers prior to the activity.
- The two-adult rule must be adhered to at all times including if a participant becomes ill or needs to leave the activity for any reason (i.e., two unrelated adults must wait with the participant until their parent/guardian arrives to pick them up while other adults remain with the larger group).
- Examples of Activities: zoo trips, ski trips, paintball, bowling, hikes, swimming

**ACTION:** The activity lead (staff member or volunteer) must contact the Chancellor's Office directly to discuss the activity and requirements at least one-month prior to the date of the activity.

## Overnight Activities (on-site or off-site)

- All employees or volunteers aged 18+ who are staying overnight must provide an Intervention Record Check (IRC) in addition to completing the other screening requirements prior to the activity.
- Physical boundaries of the facilities must be clearly defined and explained to the participants and their parent/guardian.
- Facilities must be equipped with smoke detectors, fire extinguishers and inside release doors. All participants must be made aware of fire exits and emergency procedures at the start of the activity.
- Periodic facility inspections must be conducted by assigned employees/volunteers throughout the activity to ensure health & safety is maintained.
- Employees/volunteers should be assigned to supervise specific groups of minors or vulnerable adults. Each supervisor will maintain a checklist of their group.
- If the group of children/youth or vulnerable adults consists of both genders the following apply:
  - Employees/volunteers of both genders must be present.
  - Sleeping arrangements will be made according to gender.
  - If separate rooms are not available, there will be as much space as possible between genders (participant parents/guardians must be made aware of this prior to the activity);
  - If employees/volunteers must share rooms with children, youth, or vulnerable adults, they must have their own beds and never change clothing in front of the children, youth, or vulnerable adults.
- Supervision by employees/volunteers must be provided in high risk areas such as bathrooms, change rooms, etc., while respecting privacy. The adult supervisor(s) are expected to be stationed outside of bathrooms or in an appropriate area of the change rooms so as to not be in view of participants who are changing (i.e., within hearing range should a participant require assistance).

- At least two, unrelated adults, aged 18+, will be scheduled to monitor the facilities regularly and randomly between the hours of 10:00 p.m. – 8:00 a.m. The recommendation is to have 3 individuals scheduled in case one is not available as scheduled.
- Overnight accommodation at private homes is not recommended.
- Accommodation provided in hotels, retreat centres or other settings
  - Youth 15 years & over and vulnerable adults will be assigned rooms based on gender and age.
  - Employees/volunteers will have their own rooms whenever and wherever possible.
  - Children 13 years & under must each be accompanied by their own parent/guardian or Diocesan facilities must be used (i.e., camp, parish church, hall, seminary).

**ACTION:** The activity lead (staff member or volunteer) must contact the Chancellor's Office directly to discuss the activity and requirements at least one-month prior to the date of the activity.

## Travel Outside the Diocese

1. Travel Outside the Province of Alberta or Outside Canada
  - Activities/events/excursions requiring travel outside Canada, including pilgrimages, will not be permitted for people under the age of 18 as outlined in the *Parish Regulations Manual Code TRAV*.
2. Travel Outside the Diocese within the Province of Alberta
  - Minors must not be taken on trips or excursions outside of the Diocese without the express written approval of the Chancellor's Office. A written request must be made at least 60 days prior to the planned departure date and prior to any commitment to participants or travel arrangements being made.

**ACTION:** The activity lead (staff member or volunteer) must contact the Chancellor's Office directly to discuss the activity and requirements at least one-month prior to the date of the activity.

## Overview of Screening Requirements

WHAT	WHO REQUIRES
Volunteer Information Form	All volunteers
Police Information Check (PIC)	Staff and volunteers in high risk/trust roles not involving vulnerable adults.
Vulnerable Sector Police Information Check (VSPIC)	Staff and volunteers and guests having direct contact and/or supervision of vulnerable adults.
Intervention Record Check	All adults staying overnight at an activity/event involving vulnerable adults.
Agreement to Code of Pastoral Conduct & Accountability for Volunteers	All volunteers
Code of Conduct for Youth Working with Younger Children	All youth (age 17 and under) who volunteer in roles working with children/youth younger than themselves
WHAT	WHO REQUIRES
Sexual Abuse Prevention Training	All volunteers must complete the first 4 modules of Praesidium Academy. Other modules assigned

			if working with minors and/or vulnerable adults.
	Speaker Permission from Chancellor's Office		All speakers invited to events/activities including lay persons, Catholic and non-Catholic speakers.
	Clergy Faculties		Non-Diocesan Clergy
	Pastor Approval		Organizer of the event/activity

#### Related Policies & Applicable Documents:

- *Request for Approval Form (Outings, Daytrips, Day Retreats)*
- *Request for Approval Form (Overnight Camps/Retreats)*
- *Participant Permission Form*
- *Release of Liability, Waiver of Claims and Indemnity Agreement*
- *Medical Information Form*
- *Photo & Videography Release Form*
- *Working with Minors and Vulnerable Adults: Boundaries & Standards*
- *Incident Report Form*
- *Volunteer Drivers Application & Authorization Form*
- *Parish Regulations Manual Code TRAV*

# Lay Associations and Other Organizations – Safe Environment

## Scope

Lay Associations and other organizations operating within the Diocese of Calgary as well as those from outside the Diocese.

## Policy

Associations and organizations planning an activity, event, excursion, camp, or retreat within the Diocese of Calgary involving vulnerable adults are required to obtain approval from the Chancellor's Office and provide information on their screening process.

## Purpose

This policy outlines the processes, procedures and approvals required for events/activities held by Lay Associations and other organizations within the Diocese of Calgary involving minors and vulnerable adults. These are designed to ensure that individuals over the age of 18 who supervise or chaperone events have completed the required screening and that approval for the event has been received from the Chancellor's Office.

## Guidelines

1. Programs held in partnership with the Parish/Diocese are required to have an established safe environment program or adopt the Diocesan Strengthening our Parish Communities (SOPC) program. At a minimum, the following requirements must be met:
  - Interviews and references completed for volunteers
  - Vulnerable Sector Police Information Check (VSPIC) provided
  - Review and Agreement to a Code of Conduct
  - Sexual Abuse Prevention Training completed (Praesidium or other)
  - Adherence to Diocesan protocols when working with vulnerable adults (i.e., *Working with Minors and Vulnerable Adults – Boundaries and Standards*)
  - Adherence to Diocesan policies identified in this document as if they are volunteers of the Diocese (i.e., *Workplace of Respect, Health & Safety Program, Confidentiality and Privacy, Sexual Misconduct*)

**ACTION:** Permission for “Speakers” must be obtained from the Chancellor’s Office before extending in invitation to the guest speaker. Information can be obtained by emailing the Chancellor’s Office directly or visiting our website <https://www.catholicyc.ca/outsidesspeakerpermission.html>.

2. Associations and/or organizations holding an event/activity/meeting within a parish or the Pastoral Centre involving minors or vulnerable adults not sponsored by the Diocese or under the direction of the Diocese of Calgary.
  - Use of parish facilities falls within the approval and direction of the parish Pastor or Administrator.
  - Regardless of whether an Association or other organization is using the facility once or repeatedly, it is expected that they adhere to the policies, procedures, and guidelines applicable to their situation.
  - Although not a requirement to have a Safe Environment Program in place, the Diocese strongly encourages the Association/Organization to develop a program that will ensure the safety of all vulnerable people they serve as well as protect those that engage with vulnerable people on their behalf (i.e., leaders and volunteers).
  - A contract with the parish/Catholic Pastoral Centre will be provided to the Association/Organization that outlines use of the facility, duration of use, liability waiver, and any other conditions for use of the facility including Health & Safety protocols.
3. Overnight Camps/Retreats
  - Permission from the Chancellor’s Office must be obtained for any overnight camps or retreats being held within the Diocese.
  - The organizer of the event must contact the Chancellor’s Office at least 60 days prior to the date of the event by email and provide the following information:
    - Nature of the Event
    - Date(s) of the Event
    - Location of the Event
    - Estimated number of Participants
    - Age of Participants
    - Purpose of the Event
    - Speakers
4. General Liability Insurance
  - Associations and other organizations must have sufficient liability insurance to cover any risk associated with their event or activity.
  - Any claims due to injury or accident as well as allegations of sexual misconduct are the responsibility of the Association or Organization and not the Parish or the Diocese.
  - This applies to all Lay Associations and other organization’s activities/events/meetings regardless of whether in partnership with the parish/Diocese to provide a program or service or when using parish/Catholic Pastoral Centre facilities.

- Insurance policies should be reviewed prior to your event in case additional coverage needs to be added to the existing policy or special considerations need to be given based on the type of event.

# APPENDICES

## DIOCESAN POLICIES APPLICABLE TO VOLUNTEERS

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# APPENDIX I – Strengthening Our Parish Communities (SOPC)

## Scope

All persons aged 18 or older who are an employee, volunteer, clergy or religious who work within a ministry program that provides support or service to a minor or vulnerable adult.

## Policy

The Diocese of Calgary is committed to protecting everyone we serve through our programs and services. We owe a duty of care to protect parishioners, employees, volunteers and the community-at-large, especially minors and vulnerable adults. The *Strengthening our Parish Communities Program (SOPC)* identifies the Ten Steps for Screening Volunteers and Employees that must be followed throughout the Diocese, without exception. It is everyone's responsibility, regardless of their role, to be aware and to take steps to prevent conditions that may increase the risk to minors and vulnerable adults from being present.

## Purpose

This policy sets out the Diocese of Calgary's commitment to protecting everyone served through its programs and services. It ensures volunteers and employees are aware of the consistent screening process for all volunteers and that volunteers are able to apply for roles within the Diocese and should expect to participate in the screening process.

## Procedure

Every position within the Diocese, whether staff or volunteer, will be evaluated based on the factors listed below and a rating of low or high trust/risk determined.

Evaluation factors:

- Degree of isolation of the role
- Degree of supervision
- Access to diocesan property
- Degree of physical contact
- Vulnerability of persons served (minors or vulnerable adults)
- Degree of physical or emotional demands
- Degree of trust
- Degree of inherent risk

The rating determines the screening requirements for the role which may include any or all of the following:



- Completion of a Volunteer Information Form
- Interview
- Two-three personal reference checks
- Agreement to the Code of Pastoral Conduct and Accountability
- Vulnerable Sector Police Information Check
- Intervention Record Check from Child and Family Services
- Training (including Praesidium on-line sexual abuse prevention program) and orientation
- Supervision, periodic evaluations, and follow-ups

Any individual working directly with minors and vulnerable adults will be required to adhere to established boundaries and standards for working with minors and vulnerable adults.

#### **Related Policies & Applicable Documents:**

- *Code of Pastoral Conduct and Accountability for Volunteers*
- *Volunteer Engagement - Policies, Procedures and Standards Manual*
- *Working with Minors and Vulnerable Adults: Boundaries and Standards*

## APPENDIX II – Code of Pastoral Conduct and Accountability for Volunteers

### Scope

This Policy applies to all volunteers within the Diocese of Calgary.

### Policy

All volunteers are responsible for reviewing the *Code of Pastoral Conduct and Accountability for Volunteers* and signing the *Agreement to the Code of Pastoral Conduct and Accountability* prior to engaging in any volunteer work within the Diocese.

Individuals who do not agree to adhere to the *Code of Pastoral Conduct*, as demonstrated by signing the *Agreement to the Code of Conduct*, will not be permitted to volunteer within the Diocese.

### Purpose

The *Code of Pastoral Conduct and Accountability* has been written so that all volunteers in the Diocese understand the standards they are expected to uphold when interacting with each other and staff, as well those who they serve. It ensures the highest standard of safety for all in our community and provides for the effective and efficient operation of the Diocese, its parishes, ministries, and programs.

### Procedure

- Those individuals in the Diocese assigned responsibility for onboarding volunteers will ensure that the *Code of Pastoral Conduct and Accountability for Volunteers* is provided to them during the onboarding process:
  - *Agreement to the Code of Pastoral Conduct and Accountability* (18 years and older)
  - *Agreement to the Code of Pastoral Conduct and Accountability* (for youth working with younger children)

The original signed copy of the *Agreement* will be kept on file in the parish and renewed every two years as per Diocesan policy.

## APPENDIX III – Police Information Checks & Intervention Record Checks

### Scope

This policy applies to all volunteers that are in positions assessed as high risk or having a high level of trust associated with them.

### Policy

Individuals will be required to obtain the necessary clearances (i.e., police information check and/or intervention record check) applicable to their position/role in the Diocese. However, those engaging in programs where participants are minors and/or vulnerable adults will be required to obtain a Vulnerable Sector Police Information Check as a minimum and will be required to obtain an Intervention Record Check if required for their role prior to commencing in their role.

Police Information Check (PIC) – is a process that provides information as to whether an individual has a Criminal Record and is conducted Canada-wide through both local police services and the Alberta Provincial Court records. Individuals not engaging with minors or vulnerable adults are required to obtain a PIC. Should their position change to include working with minors or vulnerable adults, they will be required to obtain the next level of record check.

Vulnerable Sector Police Information Check (VSPIC) – is a process that verifies whether an individual has a criminal record as well as any record suspensions (pardons) for sexual offenses involving minors or vulnerable adults. Any person working within the Diocese who is in a position of trust or authority over children or vulnerable adults is required to obtain a VSPIC prior to starting in their role.

Intervention Record Check (IRC) – in addition to the VSPIC, certain positions within the Diocese (i.e., Elizabeth House) are required to complete an IRC. This review determines whether an adult has an existing intervention record with Child and Youth Services, which indicates that the person may have caused a child to need intervention as defined under the Child, Youth and Family Enhancement Act.

A “clear” Police Information Check (PIC) indicates that there is no record of criminal convictions in Canada’s National Repository for criminal records.

A candidate, on condition that they obtain a PIC as quickly as possible, can receive a verbal or written offer of employment. Individuals whose role requires them to work with vulnerable people (minors and/or vulnerable adults) may not commence employment until a VSPIC is received.

If the VSPIC is not “clear” and a criminal conviction is identified, the Human Resources Office must be contacted for advice and approval prior to proceeding with the candidate commencing employment. A risk

assessment of the candidate and role in which they are being hired must be conducted, taking into consideration the nature of the conviction, potential for contact with vulnerable adults, their relation to other employees and the duties and responsibilities of the position.

## **Purpose**

The Diocese has a responsibility to ensure a safe working environment for its employees and volunteers as well as those individuals who seek support and services within our parishes (i.e., parishioners, minors, and vulnerable adults). One step towards ensuring safety is the requirement that all employees complete a Police Information Check (PIC) and a Vulnerable Sector Police Information Check (VSPIC). These checks are required as a condition of employment and will be renewed at least every five (5) years.

## **Procedure**

Access to ePIC:

1. When an individual is joining the Diocese for ministry, employment, or volunteering, they will be provided with information on how to obtain the applicable Police Check. They will receive an email invitation with a link to apply for their Police Information Check (PIC) or Vulnerable Sector Police Information Check if they are working at the CPC or Parish with access to the City of Calgary's online application process (ePIC). Through the online process, the individual will submit identification documents necessary to complete the check.
2. Once the necessary documents are submitted, the Human Resources Office or Parish Office will be notified, and they will approve the cost for the check being invoiced to the Diocese.
3. Once the check has been completed, the individual will be required to share the results with the Diocese or the Parish in which they will work through the online process.
4. If they are unable to complete the request for a check online, they may go to their local law enforcement agency and request that a check be completed. A receipt for this service can be submitted for reimbursement.
5. Should Police Services require further information from the individual, an additional fee may be applied which will reimburse on submission of a receipt.

No Access to ePIC:

- For those parishes without access to the City of Calgary's online police check system, employees will be asked to apply for their Police Check through their local law enforcement agency (i.e., RCMP). The cost of obtaining the PIC or VSPIC will be reimbursed as will any additional costs incurred if additional information is required from the candidate.

## APPENDIX IV – Confidentiality and Privacy

### Scope

This policy applies to all volunteers that are in positions assessed as high risk or having a high level of trust associated with them.

### Policy

Individuals in ministries of high risk will be required to sign a Confidentiality Agreement binding them against any release or disclosure of information acquired directly or indirectly through the course of their work concerning any business of the Diocese including parishioners, staff, donors, clergy, or other volunteers. When such information is required to be shared for professional and/or legal purposes, it is done with discretion and respect for the persons concerned by an authorized representative of the Diocese.

This policy applies whether the individual is actively engaged, on a leave of absence or whose relationship with the Diocese has ended for any reason. If someone is ever unsure of their obligations to confidentiality, it is their responsibility to consult with their direct supervisor or Human Resources.

In turn, the Diocese will only ask for personal data from those working within the Diocese that is required to maintain and/or administer the employee-employer relationship or required under the Strengthening Our Parish Communities program. Personal Data provided to the Diocese will not be released to third-party individuals without consent unless required by law.

### Purpose

To ensure that information obtained by individuals in the course of their work is not disclosed to anyone who does not have a legitimate need to know.

### Procedure

- A *Confidentiality Agreement* will be provided to individuals during their initial orientation with the Diocese.
- The original signed copy of the *Confidentiality Agreement* will be retained in the diocesan office where the individual will be working.

### Related Policies & Applicable Documents:

- *Confidentiality Agreement (Form #HR-100); HR Policies, Procedures and Guidelines Manual*
- *HR Policies, Procedures and Guidelines Manual*

## APPENDIX V – Sexual Misconduct

### Scope

The Sexual Misconduct Policy applies to all individuals working within the Diocese of Calgary including clergy, religious, employees and volunteers. This does not apply to sexual abuse of minors and vulnerable adults.

### Policy

Members of the Diocesan community have the right to be free from sexual violence and harassment. All those who work or volunteer within the Diocese are expected to conduct themselves in a manner that does not infringe upon the rights of others or harm them in any way. Any individual who believes they have been subject to sexual misconduct are encouraged to report these incidents. When an allegation of misconduct is brought to an appropriate Diocese representative, the Diocese will respond promptly, equitably, and thoroughly to stop the behaviour, remedy its effects, and prevent its recurrence.

### Purpose

This policy has been developed to reaffirm these principles and to provide recourse for those individuals whose rights have been found to be violated.

### Procedure

#### Reporting:

Anyone who believes they have been the victim of sexual misconduct or harassment by an employee of the Diocese or volunteer should immediately report the incident to their immediate Supervisor, the Human Resources Office, or by calling the confidential diocesan information hotline, *If You Choose to Talk About it*, 1-833-547-8360.

Brittany Teixeira  
Human Resources Manager  
403-218-5549  
[Brittany.Teixeira@calgarydiocese.ca](mailto:Brittany.Teixeira@calgarydiocese.ca)

Any volunteer who knows or has reason to know of incidents, allegations, or acts of sexual misconduct or harassment shall promptly inform one of the above listed individuals. Employees are required to disclose all information including the names of the parties to help ensure that the Human Resources Office will be able to act. Volunteers will be asked to disclose the names of the parties involved in the incident, as well as other potential witnesses, in order for the Human Resources Office to be able to act on the information. In some cases, not all of the individuals named will be contacted once Human Resources reviews the situation and determines the best course of action in accordance with the appropriate policy.

All reported incidents or allegations will be investigated regardless of the severity of the incident and/or

individuals involved.

If the incident falls within the guidelines described within the *Workplace of Respect Policy (Human Resources Policy #810-033)*, the Human Resources Office will be responsible for investigating the incident as per established procedures and providing a report to the Moderator of the Curia. Incidents covered by the *Workplace of Respect Policy* include:

- Unprofessional Conduct
- Personal Harassment (i.e., bullying, cultural insensitivity, discrimination, sexual harassment, workplace violence)

**Related Policies & Applicable Documents:**

- *HR Policies, Procedures and Guidelines Manual*

## APPENDIX VI – Workplace of Respect

### Scope

The Workplace of Respect Policy applies to all clergy and religious, employees, volunteers, participants in programs and events, parishioners and others doing business within the Diocese of Calgary (i.e., contractors, lay associations).

### Policy

This policy prohibits all forms of unprofessional conduct, personal harassment (bullying, cultural insensitivity, and discrimination), sexual harassment and workplace violence – hereinafter referred to as violations of respect – by management, supervisors, employees, contractors, subcontractors, suppliers, volunteers, parishioners, or any other individual who has interactions within our place of work. All reported violations of respect will be investigated and, if substantiated, dealt with expeditiously.

### Purpose

The Diocese is firmly committed to ensure a positive and professional working environment exists in which all employees, volunteers and visitors are treated with respect and dignity. Respect is defined as the willingness to show consideration for the rights or feelings of others; to treat them courteously, inclusively, and safely. We believe in a proactive approach to workplace respect and support the objective of providing all individuals with a healthy and safe workplace that is free from any form of harassment. It is required that everyone take preventative action to ensure that risks to an individual's health and safety due to violations of respect are eliminated or reported.

### Definitions

Violations of respect are defined as:

- **Unprofessional Conduct** – Behaviours that are unacceptable and can include inappropriate tone of voice, belittling behaviour such as eye-rolling, outward signs of exasperation or frustration, condescending verbal and/or body language, favoritism, or inappropriate communication (verbally or through email exchange).
- **Personal Harassment** – occurs when an employee is subjected to unwelcome verbal or physical conduct that is offensive, demeaning, humiliating, hostile or embarrassing to an employee or group of employees. It includes bullying, cultural insensitivity and discrimination. Onus is on the person experiencing the harassment to inform the harasser or a supervisor that the behaviour is unwelcome.
- In our policy, personal harassment is divided into:
  - **Bullying:** interpersonal hostility that is deliberate, repeated and sufficiently severe as to harm the targeted person's health, safety, or economic status. It is driven by the perpetrator/bully's desire to control another individual, humiliate them or intimidate.
  - **Cultural insensitivity:** includes behaviour(s) directed towards an individual from another culture that would be considered disrespectful or cause humiliation or frustration to that



individual based on cultural differences (using a gesture which could have an inappropriate meaning in another culture or in appropriate language such as referring to “your people”).

- **Discrimination:** defined differences based on the personal characteristics of an individual resulting in some disadvantage to that individual. Discrimination is a form of harassment prohibited under the *Alberta Human Rights Act*. Employers are legally responsible for actively discouraging and prohibiting humiliating conduct or language that results in the working conditions of one employee being less favourable than those of another employee based on the following grounds:
  - Race
  - Age
  - Religious beliefs
  - Colour
  - Marital status
  - Gender
  - Mental disability
  - Physical disability
  - Ancestry
  - Sexual orientation
  - Source of income
  - Family status
  - Place of origin
- **Sexual Harassment:** any unwelcome behaviour, which is sexual in nature. For example:
  - Posting suggestive photographs
  - Telling sexual jokes or making innuendoes
  - Leering, whistling or other inappropriate gestures
  - Vulgar language
  - Romancing subordinates
  - Referring to female employees as “girls”
  - Touching, physical grabbing or flirting with unwilling or even willing subordinates
  - Requesting sexual favours
  - Making similar unwelcome sexual advances to co-workers
- **Workplace Violence:** the threatened, attempted, or actual conduct of a person that causes or is likely to cause physical injury. These acts include threats, menacing or threatening behaviour, and all types of physical or verbal assaults.

It may not always be obvious when harassment is taking place. Erring on the side of caution continues to be a most prudent, respectful, and responsible course of action for all employees. Respect and responsibility are key elements in maintaining a harassment free workplace.

The Diocese will take any and all course of action available to it to prevent harassment from occurring, such as affirmatively raising the subject, expressing zero tolerance for any form of harassment, informing employees of their right to raise the issue of harassment and, developing a process for reporting harassment.

This policy is not intended to discourage an employee from exercising their rights pursuant to any other law concerning harassment or workplace violence, including the *Alberta Human Rights Act*.

In adherence to this policy, the following will guide violations of respect:

- Employees are encouraged to immediately report and seek resolution of any incident involving harassment, violence, or threats of violence to their direct supervisor or Human Resources.
- There shall be no adverse job consequences against any person for notifying management of a violation of this policy unless the investigation determines that the person intentionally fabricated the charges against the accused.

- There shall be no retaliation from co-workers directed at an individual making a complaint. In the event it is found that retaliation against an employee who exercises his or her rights under this policy has occurred, severe discipline up to and including termination and ineligibility for rehire will be imposed.
- Investigations will be conducted in strict confidence by the Human Resources Office and/or Moderator of the Curia and/or applicable department Director. Confidentiality is not the same as anonymity. The respondent (offender) is entitled to know the identity of the complainant and to receive a written copy of the complaint outlining the specifics of the allegation(s).
- Investigators will advise employees involved or consulted throughout the process that discretion and strict confidence is required, and that breaking of confidence could result in disciplinary action.
- The Diocese will not disclose the circumstances related to an incident of harassment or the names of the complainant, the person alleged to have committed the harassment, and any witnesses, except
  - Where necessary to investigate the incident or to take corrective action, or to inform the parties involved in the incident of the results of the investigation and any corrective action to be taken to address the incident, or
  - As required by law.
- Where necessary, the Diocese will disclose only the minimum amount of personal information necessary to inform employees of a specific or general threat of violence or potential violence. The Moderator of the Curia will determine the appropriate amount of information to be disseminated to employees (i.e., name of accused and potential threat).
- Malicious or false complaints and violations of respect will not be tolerated, and appropriate disciplinary action will be taken, up to and including dismissal, ineligibility for rehire, and/or loss of other privileges may be invoked.

## Procedure

### Informal Resolution:

Any individual may choose to initiate action to resolve a harassment situation. Possible action could include some or all of the following:

- One-on-One Discussion – The complainant may inform the offender that the actions are unwelcome and must stop immediately.
- Manager/Supervisor Involvement – The complainant may request the involvement of a manager or supervisor to provide informal intervention towards an acceptable resolution of the situation.
- Human Resources Involvement – This can take various forms from providing education and sharing sessions with affected staff; reinforcement of standards, policies, and expectations.
- Conciliation/Mediation – A neutral third party (i.e., Supervisor, Manager, Human Resources) meets with the two parties either together or separately in an attempt to resolve the concerns and to build agreement on how interactions will occur in the future.

### Formal Resolution:

The formal process of complaint resolution may be pursued in the event that an informal approach does not resolve the situation or when the complainant or the Diocese believes the formal process to be more appropriate based on the nature of the violation. If however, at any point in the formal process consensus is

reached that an informal approach is more appropriate, the formal process may be suspended.

**Steps:**

1. Formal complaints are to be submitted in writing to the Human Resources Office.
2. If an investigation is deemed necessary, the Human Resources Manager will:
  - a) Advise the alleged offender in writing, of the nature and specifics of the allegations and inform the individual of his/her rights and of the investigation process. The complaint should include:
    - Names of individuals involved
    - A clear description of the incident(s) of concern including dates, times, places
    - Names of witnesses, if any
  - b) Determine if the complaint falls within the Workplace of Respect Policy
    - If the concern falls within the Workplace of Respect Policy, the Human Resources Office will determine whether a formal investigation is appropriate or alternatively, whether an informal resolution should be pursued
    - If the concern doesn't fall within the Workplace of Respect Policy, the Human Resources Manager will advise the complainant that it will not be pursued under that policy and will advise of other possible processes that may be appropriate
  - c) Advise the complainant of the investigation process;
  - d) Inform the Moderator of the Curia that a complaint has been filed and investigation commenced. A decision will be made whether the Human Resources Office will be the sole investigator or if a committee will investigate. This decision will be dependent on the nature of the complaint and/or individuals involved;
3. The alleged offender will be provided with a copy of the written allegation;
4. The investigator(s) will forward a written report with the findings of the investigation and appropriate recommendations to the Moderator of the Curia within thirty (30) working days;
5. Disciplinary action consistent with that outlined in this policy will be taken based on the evidence and findings contained in the report and as set by precedent;
6. The investigator will advise the complainant of the outcome of the investigation and subsequent action taken, as soon as possible.

**Progressive Discipline**

Progressive Disciplinary measures will be taken against the offender should an investigation provide sufficient evidence of a violation of respect. Each situation will be assessed on its own merit and disciplinary action determined based on severity of the infraction. Disciplinary steps are as follows:

1. Verbal warning: Spoken communication when the violation is of a minor nature and a first occurrence.
2. Written warning: Written communication to the individual. It may or may not be a first violation.
3. Suspension: The temporary removal of an individual from the workplace for a set period of time. Suspension is issued when:
  - The violation is of a serious nature even though it may be a first occurrence
  - The violation is of a minor nature but is a continuation of unacceptable behaviour after previous corrective action
4. Termination: Employment termination of the individual. Termination is issued when:

- The violation is of such a serious nature that employment cannot continue
- The violation is a final incident in a series of incidents

### **Monitoring Progressive Discipline**

The Human Resources Office will be responsible for tracking progressive discipline and monitoring the effectiveness of the Workplace of Respect policy.

### **Related Policies & Applicable Documents:**

- *HR Policies, Procedures and Guidelines Manual*

## APPENDIX VII - Conflict of Interest

### Scope

This policy applies to all employees, volunteers, clergy and religious within the Diocese of Calgary.

### Policy

Individuals working within the Diocese are expected to carry out their duties with a high degree of ethics and professionalism. Individuals must avoid situations where their private interests, ventures or relationships may affect his/her judgment in acting on behalf of the Diocese or when making recommendations or decisions regarding dealings with other persons or organizations. Individuals are required to address the appearance of conflicts or the potential for conflicts with their supervisor or Human Resources.

### Purpose

This policy is intended to enhance internal and public confidence in the integrity of the Diocese and its employees, volunteers, clergy and religious. The Diocese benefits from the expertise of individuals with multiple interests; however, those interests must not conflict with the interests of the Diocese nor impair the public support and respect necessary for the operation of the Diocese and its programs.

### Conflicts of Interest

Employees, volunteers, clergy or religious may not at any time engage in any activities which conflict with the interests of the Diocese, which may adversely affect the reputation of the Diocese, or which may interfere with the fulfillment of their work which always must be in the best interests of the Diocese.

- **Outside Activities**

Individuals shall not devote any time during committed Diocese business hours to an activity which deprives the Diocese of the individual's full services.

- **Gifts, Entertainment and Favours**

Accepting gifts, entertainment or other favours from individuals or organizations can also result in a conflict of interest when the party providing the gift/entertainment/favour does so under circumstances where it might be inferred that such action was intended to influence the interested person in the performance of his/her duties. All gifts and entertainment must be divulged to a supervisor or the Human Resources Office

- **Honoraria and Fees**

Any employee who receives an honorarium or fee for work or services arising from their Diocesan position shall give such monies to the Diocese whether or not such monies were given during regular

working hours.

- **Stipends**

Only members of the clergy are permitted to receive stipends for work or services performed as outlined in *Parish Regulations Manual* Code: STOL.

- **Community Relations and Government**

Dealings involving the individuals working within the Diocese (paid or unpaid) and community or government officials must be conducted openly, legally, and ethically at all times. Individuals must not behave in a manner that is damaging to the Diocese.

## **Procedure**

Employees, volunteers, clergy, or religious who find themselves in a potential or actual conflict of interest situation have the duty to notify their supervisor or the Human Resources Office as soon as they become aware of the potential or actual conflict of interest.

### **Related Policies & Applicable Documents:**

- *Conflict of Interest Disclosure (Form #HR-105); HR Policies, Procedures and Guidelines Manual*
- *Parish Regulations Manual*

## APPENDIX VIII – Whistleblower

### Scope

All individuals working or providing services within the Diocese of Calgary as well as those who visit the Diocese, including priests, deacons, religious, employees, volunteers, parishioners, contractors, and tradespeople.

### Policy

Priests, deacons, religious, employees and volunteers must be responsible in the use of all Diocese assets; to provide accurate, complete, and objective information; to respect the confidentiality of financial and other information; to act in good faith and exercise due care in all we do; to comply with all rules and regulations, and to proactively promote ethical behaviour.

### Purpose

The purpose of the Whistleblower Policy is to promote and encourage a culture of openness, trust, and integrity in all Diocese practices and decisions.

### Procedure

- Reporting a wrongdoing under this policy can be made to either the Human Resources Office or the Moderator of the Curia. Should either a member of the Human Resources Office or the Moderator of the Curia be involved in the wrongdoing then the report should be made directly to the Bishop.
- Reporting by an employee or volunteer should be made in writing and include:
  - Description of the wrongdoing
  - The name of the individual(s) alleged to have committed the wrongdoing or are about to commit the wrongdoing
  - The date of the wrongdoing
  - Any other witnesses to the wrongdoing
  - Any additional information that the Human Resources Office, Moderator of the Curia or Bishop may require to investigate the matter(s) as set forth in the report.

#### Examples of ethical wrongdoing that should be reported include:

- Receiving of ‘kickbacks’ or significant gifts from contractors or vendors which could create bias in the tendering of projects;
- Inappropriate recording or reporting of revenues or other financial information;
- Misappropriation of funds, supplies or other assets;
- Disclosing confidential and proprietary information to outside parties;

- Destruction, removal, or unauthorized use of records, furniture, fixtures, and equipment;
- A deliberate disregard or circumvention of Diocese policy that may cause harm to the environment;
- Knowingly directing or coaching an individual to commit wrongdoing.

**Related Policies & Applicable Documents:**

- *HR Policies, Procedures and Guidelines Manual*



## APPENDIX IX – Internet, Email and Computer Use

### Scope

This Policy applies to all employees, volunteers, clergy, and religious working within the Diocese of Calgary whose roles require access in the course of their duties to computers, internet, email functions, etc.

### Policy

When individuals are selected to assist in roles requiring access to computers, internet, email functions, etc., they agree to use these resources appropriately and to abide by any policies, practices, procedures, or guidelines set out by the Diocese regarding internet, email and computer use.

### Purpose

Computer technologies are provided to individuals for the efficient exchange of information and the completion of assigned responsibilities consistent with the mission of the Diocese. It is imperative that they do not abuse or misuse the technologies and services. The use of the internet by any employee or other person authorized by the Dioceses (users) must be consistent with this Policy in addition to policies, practices, and procedures established in each parish.

### Procedure

By signing the companion *Agreement to the Code of Pastoral Conduct and Accountability* for their applicable role in the Diocese, each individual is agreeing to abide by the Electronic Communications guidelines established in the Code.

### Guidelines

The use of computers, the internet, mobile phones, and email in the context of ministry must be in support of and consistent with the faith and teaching of the Roman Catholic Church. The following are general guidelines and rules for their use:

- E-mail that is used in the context of ministry is a form of diocesan and church communication and it should be treated as such.
- It should be noted that e-mail activity and product are property of the Diocese of Calgary and are subject to subpoena; users are to create their messages with the understanding that the messages might be read and reviewed out of context and at a later date by other individuals, some of whom may represent interests adverse to those of the Diocese. Records of an official nature or policy statements are to be maintained in paper and/or electronic format.
- One must be professional in all e-mail communications.
- Email accounts provided by the parish/Diocesan office should not be used for personal communications.

- Internet service and computers may be used for occasional personal use. Any personal use is preferably done during non-working hours and only if it does not interfere with anyone else.
- Communication and information accessible via the internet are considered the private property of those who place it on a social electronic network. However, one must realize that all information transmitted via e-mail, text messaging, the internet, and social media can potentially be accessed and stored by anyone who has a computer or a mobile phone.
- With the exception of an emergency, all communication between diocesan personnel, parish employees, volunteers and any participant in a program or receiving pastoral services should take place between the hours of 7:00 am and 9:00 pm, including the posting to websites and social networking sites unless scheduled with a post scheduler application.
- The appropriate professional boundaries that are expected in face-to-face or verbal communication should also be expected in all electronic/digital means of communication.
- To prevent breach of software licensing agreements, there is to be no removal, copying or installing of diocesan/parish software on an individual's own personal computer. If one believes that they need access to a particular software at home, they must consult their immediate supervisor who will determine if access is required, and when necessary, obtain a valid copy of the software.

#### **Internet Use:**

- Respect the privacy of other users; for example, users shall not intentionally seek information on, obtain copies of, or modify files or data maintained by other users, unless explicit permission to do so has been obtained.
- Respect copyright and license agreements for software, digital artwork, and other forms of electronic data.
- To protect data from unauthorized use or disclosure as required by provincial and federal laws and Diocesan regulations.
- Respect the integrity of computing systems: for example, users shall not use or develop programs that harass other users or infiltrate a computer/computing system and/or damage or alter the software components of a computer.
- Limit personal use of the internet and equipment to that which is incidental to the user's official job assignment. Activities for private purposes, meant to foster personal gain, or advertising products or services unrelated to diocesan activities are not permitted.
- Safeguard accounts and passwords. Accounts and passwords are normally assigned to single users and are not to be shared with any other person without authorization. Users are expected to report any observations of attempted security violations.

#### **Acceptable Use**

- Activities related to official job assignments as well as incidental personal use in compliance with this policy.
- Transmitting materials and correspondence which courteously respect the human dignity and security of every human being, both the addressee and any person under the discussion on the correspondence
- Authorized distribution of Diocesan data and information.
- Politically nonpartisan materials and correspondence.

- Materials and correspondence consistent with the teaching of the Roman Catholic Faith.
- Materials and correspondence presented as being the official position of the Diocese of Calgary, only that which has been authorized and/or designated as such.
- Uploading/downloading of software only in accord with copyright and other applicable laws and rights.
- Downloading software or electronic files with all due and reasonable virus protection measures in place.
- Operation with due care and protection for the normal operations of any or all Diocesan internet gateways.

#### **Unacceptable Use:**

- Sharing personal mobile phone numbers with minors without the parent or guardian being copied and aware of the exchange.
- Collecting email addresses, phone numbers or any medium of communication with minors without the written permission from parents or guardians;
- Communicating with minors by email, text, or other electronic messaging services.
- Engaging in any illegal or unethical activities.
- Viewing or distributing pornography.
- Distributing a virus or other harmful component.
- Violating copyright laws by unlawfully downloading or using information or software that is protected by copyright.
- Indiscriminately copying email messages to individuals or sending irrelevant messages, inappropriate jokes, or pictures.
- Disclosing confidential information about the Diocese, parishes, offices, ministries, programs, or matters related to personnel.
- Expressing personal opinions that appear to be on behalf of or representing the Diocese, its parishes, offices, ministries, or programs.

#### **Diocese of Calgary Rights**

It should be clearly noted that there are no means provided for sending or receiving private or confidential electronic communications. System administrators have access to all mail and user access requests and will monitor messages as necessary to assure efficient performance and appropriate use. Messages relating to or in support of illegal activities will be reported to the Executive Director, Finance & Administration, Moderator of the Curia and/or Human Resources office.

- The Diocese reserves the right to log network use and monitor file server space utilization by users and assumes no responsibility or liability for files deleted due to lack of file server capacity.
- The Diocese reserves the right to remove a user account from the network.
- The Diocese will not be responsible for any damages incurred, and whether incurred by any user or any other party arising out of or in connection with use of the network. This includes the loss of data resulting from delays, non-deliveries, or service interruptions caused by negligence, error, or omissions. The Diocese makes no representations or warranties, either express or implied, with regard to software or data obtained from the internet.
- The Diocese reserves the right to change its policies and rules at any time. The Diocese assumes no responsibilities for:
  - The content of any advice or information received by a user through the internet, or any costs or charges incurred as a result of seeing or accepting such advice.

- Any costs, liabilities or damages of any kind or nature arising out of or in connection with user's use of the internet.
- Any consequences of service interruptions or changes, even if these disruptions arise from circumstances under the control of the Diocese. Internet is provided on an as is, as available basis.

**Related Policies & Applicable Documents:**

- *HR Policies, Procedures and Guidelines Manual*

## APPENDIX X – Health & Safety Program

### Scope

The Health & Safety Program applies to all clergy and religious, employees, volunteers, and others doing business within the Diocese of Calgary (i.e., contractors, lay associations).

### Policy

The Diocese has developed a health and safety program that outlines the safety measures and procedures that are to be implemented in our workplaces as required under *Alberta Occupational Health & Safety* legislation.

All employees and volunteers are expected to be familiar with the *Health & Safety Program* and adhere to the policies, procedures and rules as outlined in each of the areas identified in the program manual that are relevant to their role within the Parish/Catholic Pastoral Centre or other diocesan program. Those parishes with 20 or more employees are expected to implement the *Health and Safety Program* in its entirety as required by *Alberta Occupational Health & Safety*. Parishes with less than 20 employees will participate in the program as required by the Diocese.

Safety is everyone's responsibility and employees are responsible for ensuring that they know their rights and responsibilities as defined in the program. Adherence to the *Health & Safety Program* constitutes part of an Employment Agreement or Volunteer Agreement.

### Purpose

The Health & Safety Program is meant to secure the safety of those working in the Diocese as well as those visiting. The program includes description of the kinds of hazards that may exist in the workplace, how they can be eliminated or controlled, and what sort of policies, procedures, rules and/or equipment will be used to ensure a healthy and safe work environment. The program encourages people to be aware of their roles and responsibilities and to work together to identify and solve health and safety concerns.

### Procedure

- Employees and volunteers working within the Diocese at the time that the *Health & Safety Program* is implemented will receive an orientation to the program which will include:
  - Responsibilities
  - Right to refuse to perform unsafe work
  - Reporting hazards and/or unsafe conditions
  - Workplace Inspections
  - Reporting accidents and injuries

- Emergency response procedures
- New employees and volunteers will receive an orientation to the program on the first day they start in their role.
- Prior to commencing work within the Diocese, contractors and sub-contractors will be required to participate in the Diocese *Health & Safety Program* orientation if they do not have a similar program within their company.

**Related Policies & Applicable Documents:**

- *Health & Safety Program Manual*
- *HR Policies, Procedures and Guidelines Manual*

# APPENDIX XI - Communicable Diseases

## Scope

This policy applies to all clergy and religious, employees and volunteers within the Diocese of Calgary.

## Policy

The Diocese will follow the recommendations made by Alberta Health Services as appropriate for the specific disease and will make every attempt to protect the privacy of infected persons in accordance with provincial and federal laws. Individuals who fall within the scope of this policy are expected to review Alberta Health Services when diagnosed with a communicable disease.

## Purpose

The purpose of this policy is to educate and stress the importance of preventing or minimizing the spread of communicable diseases and to provide direction for and responding to communicable diseases that may threatened diocesan operations and the safety of diocesan employees and volunteers.

## Definitions

Communicable/infectious disease means an infectious disease transmissible by an affected individual to others via direct or indirect means. Examples of direct transmission include droplet spray from sneezing, coughing, spitting, singing, or talking. Examples of indirect transmission include utensils, food, water, clothing, air, soil or insects, exposed surfaces (i.e., desks, doorknobs).

Types of infectious diseases include but are not limited to:

- |                                 |                       |
|---------------------------------|-----------------------|
| - Malaria                       | - Chicken Pox         |
| - Strep Throat                  | - Conjunctivitis      |
| - Influenza (the flu)           | - Hepatitis (A, B, C) |
| - HIV/Aids                      | - Lice                |
| - Measles                       | - Ringworm            |
| - Mumps                         | - Scabies             |
| - Rubella                       | - Scarlet Fever       |
| - SARS                          | - COVID-19            |
| - Sexually Transmitted Diseases | - Tuberculosis        |
| - Yeast Infections              | - Common Cold         |

## Procedures

- Those who knowingly have an infectious/communicable disease are asked to self-isolate and stay home for the period of time recommended by Alberta Health Services for the specific disease in order to limit transmission to others in the workplace.
- They should contact the Alberta Government's Health Link 811 directly to speak to a Registered Nurse 24/7 for health advice and information on the incubation period for their symptoms.
- In the event of a disease outbreak affecting or potentially affecting a significant number of people within the Diocese will form a working group of individuals to monitor and coordinate activities to control the outbreak based on the advice and guidance of Alberta Health Services. Responsibilities of the workgroup will include developing work rules specific to the nature of the outbreak, including exclusions/restrictions from work and the reassignment of duties as well as financial compensation for those affected with the disease or those with the potential for infection.
- Based on the advice and guidance of Alberta Health Services, the Diocese maintains the right to restrict employee access to the workplace when domestic and/or international travel advisors have been issued by the Government of Canada and/or Alberta Health Services as a result of an occurring or potential outbreak.

## **Prevention**

- Wash hands often and well
- Avoid touching your face, nose, or mouth with unwashed hands
- Avoid close contact with people who are sick
- Clean and disinfect surfaces that are frequently touched
- Stay at home and away from others if you are feeling ill
- When sick, cover your cough and sneezes (i.e., cough into elbow) and then wash your hands

## **Related Policies & Applicable Documents:**

- *HR Policies, Procedures and Guidelines Manual*