The Episcopal Diocese of North Carolina

Best Practices for Safe Church
Policy, Procedures & Resources

*A Handbook for Adult Employees and Volunteers
in Ministry with Other Adults, Children, Youth and Vulnerable Individuals
Revised December 2022*

> *"From everyone to whom much has been given, much will be required; and from the one to whom much has been entrusted, even more will be demanded."*
>
> Luke 12:48

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The church has always recognized that those in ministry bear a particular responsibility to pattern their lives according to Jesus example. Bishops, priests, deacons and lay leaders are regarded by the faithful and the world as examples of what a Christian life should be; any moral offense by church ministers is especially hurtful because it betrays that trust committed to them by the church to nurture and care for every member.

The Episcopal Diocese of North Carolina, in compliance with the Model Policies of the Episcopal Church, has developed guidelines and procedures for those ministering to children, youth, and adults, including individuals who, due to sexual orientation and/or physical limitations, may be especially vulnerable.

The Bishop of North Carolina, as chief pastor of the church in the Diocese of North Carolina, recognizes a sacred duty to ensure that the church is a sanctuary, a safe haven for all people, providing an atmosphere of trust in which the Holy Spirit might work for healing, wholeness and growth. Misconduct prevention is a duty for all Christian people. It is not simply a matter of knowing and keeping a set of rules; it is a way of life and a set of practices that helps us learn and grow as disciples of Jesus Christ and ever more effective ministers in His church.

The Episcopal Diocese of North Carolina strives to keep up with the ever-changing needs of our congregations and those whom they serve. This document provides relevant and up-to-date practices, including guidelines relating to working with vulnerable adults who may receive visitations from lay ministers. Guidelines for working with children and youth (including infants and toddlers), as well as information about transportation, medication, supervision, and technology such as social media, are also included. In addition, there are guidelines for best practices when working with individuals of different sexual orientations, particularly in youth ministry.

These Best Practices for Safe Church, Safe Communities set forth statements of general expectations and guidelines of behavior for ordained and lay people in the church when engaged in ministry with all adults, children, and youth (including vulnerable adults and individuals with special needs). The purpose of these policies is to prevent sexual abuse and to create safe and welcoming spaces for all persons, especially children, youth, and vulnerable adults in our communities.

These are models and, as such, present best practices for creating such safe spaces. Diocesan Council, with the bishop, strongly encourages individual parishes and missions to adopt these best practices to the extent possible.

Church governing bodies and all leaders should understand these policies and all local requirements thoroughly enough to make appropriate judgments and should consult with the office of the bishop when unanticipated situations arise.

No policy can foresee every possible circumstance to which it may be applied. Whenever applicable, questions of civil, criminal, and ecclesiastical discipline and employment offenses should be addressed with the relevant authorities immediately. Please contact the Diocesan Pastoral Response Team or the office of the bishop for consultation and resources if assistance is needed.

The Episcopal Diocese of North Carolina recognizes the time commitments of all those serving in our church while also insisting on the extreme importance of Safe Church, Safe Communities training. Safe Church, Safe Communities Training is available through a partnership with the Church Pension Group and Praesidium Academy.

This version of the Episcopal Diocese of North Carolina's Best Practices for Safe Church: Policy, Procedures, and Resources was updated following a Resolution from the 80th General Convention in 2022. The Resolution commended to all members of the Church the course of Safe Church, Safe Communities Training provided by The Episcopal Church and the Church Pension Group so that all members can participate fully in creating and maintaining safe environments for all people throughout the Church.

The Bishops and Diocesan Council of the Diocese of North Carolina strongly encourage individual parishes and missions to adopt these best practices to the extent possible. Diocesan staff and paid parish staff who work with members of the congregation on a regular basis are required to take Safe Church, Safe Communities Training.

Note on page 40, that contractors who should take the training are those who work with members of the congregation on a regular basis.

Any such additions or revisions must be submitted in writing for the approval of the bishop. No provisions may be omitted from a local policy.

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I.   DEFINITIONS:

Adult: Anyone who is 18 years or older and not in high school. [1]

Adult Protective Services: A social services program provided by state and local governments serving vulnerable adults and their families who require assistance. Adult Protective Services receive and investigate reports of suspected abuse, neglect, and exploitation.

Bullying: Behavior that intimidates, humiliates, offends, degrades or harms another person, whether verbal, psychological, social, physical, or otherwise.

Child: Anyone under the age of 12. (See footnote)

Child Protective Services: A social services program provided by state and local governments serving children and their families who require assistance. Child Protective Services receive and investigate reports of suspected abuse, neglect, and exploitation.

Cisgender: An adjective describing a person whose sense of personal identity and gender corresponds with their gender or sex assigned at birth. This is an evolving term, as our understanding and language around gender identity and sexuality expand and mature.

Gender Non-binary: An umbrella term for people who identify their gender as neither male nor female. These people might identify as both ("bi-gender"), neither ("a gender"), a mix between the two ("gender fluid"), or they can be unsure of their gender ("genderqueer"). This is an evolving term, as our understanding and language around gender identity and sexuality expand and mature.

Infant: Typically applied to young children between one month and one year of age; however, definitions may vary and may include children up to two years of age. When a child learns to walk, the term "toddler" may be used instead.

Intake Officer: The person(s) designated by each diocese to receive information regarding an offense for which a member of the clergy may be held accountable under Title IV of the Constitution and Canons of The Episcopal Church, which sets out the disciplinary process for clergy. Anyone may contact an intake officer to report concerns, using the following email address: PTRChair@episdionc.org.

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[1] Ages established in accordance with generally accepted definitions in the United States. These ages may vary across the wider Episcopal Church.

Leader: Any individual (adult or youth) volunteering assistance with leadership responsibility of any ministry with the church. Though this individual is not the person with final authority (probably a priest, paid staff member, or vestry member), he or she still must abide by all the Safe Church, Safe Communities Policies outlined in this document. Examples include Sunday school teachers, camp counselors, and program team members.

LGBTQ+: An acronym for Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, and others. It refers to people whose gender identities vary from their gender or sex assigned at birth, or whose sexual orientations differ from the heterosexual majority. The "+" is an effort to include additional gender identities. This is an evolving term, as our understanding and language around gender identity and sexuality expand and mature.

Mandated Reporter: A person who is required by state law to report reasonable suspicions of abuse, neglect, and exploitation of vulnerable populations to the appropriate state agency. State laws vary greatly. North Carolina child abuse laws require mandatory reporting by "any person or institution." One who suspects abuse or neglect of a child is required by NC State Law to report what he or she knows to the county Department of Social Services[2]. As long as you act in good faith, you cannot be held liable (N.C.G.S. §7B-309).[3]

Off-site: Any location other than the sponsoring Episcopal church, institutional facility or campus.

Organizations: All institutions for which the Diocese or congregations have legal or fiduciary responsibility (such as diocesan departments, commissions, conference and retreat centers, adult day care centers, retirement communities, religious orders, congregations, schools, et cetera).

Overnight: Any event that starts on one calendar day and ends on a different calendar day.

Pastoral Relationship: Any relationship (1) between a member of the clergy and any person to whom the member of the clergy provides or has provided counseling, pastoral care, spiritual direction, or spiritual guidance, or from whom such member of the clergy has received information within the Rite of Reconciliation of a Penitent, or (2) between a lay minister and any person to whom the lay minister is offering prayer, ministry, and/or any person from

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[2] NC General Assembly. (n.d.). Retrieved November 26, 2022, from
　　　https://www.ncleg.gov/EnactedLegislation/Statutes/HTML/BySection/Chapter_7B/GS_7
　　　B-301.html

[3] NC General Assembly. (n.d.). Retrieved November 26, 2022, from
　　　https://www.ncleg.net/EnactedLegislation/Statutes/HTML/BySection/Chapter_7B/GS_7
　　　B-309.html

whom the lay minister has received sensitive, personal, or confidential information in the course of offering ministry.

Pastoral Response Team: a group of lay and ordained men and women selected by the bishop for their collective professional experience in the fields of pastoral care, spirituality, psychology, congregational life, law, and conflict mediation. They can provide valuable insight, resources, and plans for clergy, employees, and congregations dealing with sensitive pastoral situations that require psychological, legal, or professional counsel. Call 1-877-332-3394 or go to [http://www.dionc.org/Diocese/pastoral-response.html]

Power Dynamics: The way different people or groups of people interact with each other and when one of these sides is more powerful than the other one; the ability to influence or outright control people's behavior.

Programs: Official activities and programs sponsored by The Episcopal Church and its provinces, dioceses, and congregations (examples include: Episcopal Youth Event, provincial youth events, Happening, Teens Encounter Christ, pilgrimages, mission experiences, New Beginnings, camp programs, acolyte festivals, etc.).

Public Records Check: A search of documents and data available to the public, including criminal and civil court records, credit reports, and driving records from the department of motor vehicles. Typically, such searches are conducted by a third party with expertise in this area.

Residential Facility: Any institutional or group home setting where a vulnerable adult resides on a permanent or temporary basis, such as a nursing home, rehabilitation center, assisted living facility, treatment center or memory care facility.

Responsible Person: The person designated as being accountable for compliance with a given policy for an event or program.

Sacramental Use: Consecrated or unconsecrated wine used in the setting of Eucharist.

Sexual Misconduct is a general term used to describe the following:

1. **Sexual abuse** or sexual molestation of any person, including but not limited to, any sexual involvement or sexual contact with a person who is a minor or who is legally incompetent;

2. **Sexual Harassment** in a situation where there is an employment, mentor or collegial relationship between the persons involved, including but not limited to:

    a.   sexually-oriented language or humor;

    b.   questions or comments about sexual behavior or preference unrelated to employment qualifications;

    c.   undesired physical contact;

    d.   inappropriate comments about physical appearance or clothing;

    e.   repeated requests for social engagements;

3. Sexual Exploitation, including but not limited to the development of or the attempt to develop a sexual relationship between a cleric, employee or volunteer and a person with whom he or she has a pastoral relationship, whether or not there is apparent consent from the individual.

Supervisor: A person who has oversight responsibilities for a ministry program or leaders in a ministry program.

Title IV: A section of the Constitution and Canons of The Episcopal Church pertaining to clergy professional standards, accountability and ecclesiastical discipline.

Transgender: An adjective describing a person whose sense of personal identity and gender does not correspond with the gender or sex assigned to them at birth. Someone who identifies as transgender may use different pronouns than those assigned at birth. Additionally, they may also you the pronouns they/them. This is an evolving term, as our understanding and language around gender identity and sexuality expand and mature.

Training: Organized activity designed to provide information and/or instructions to strengthen and enhance the recipient s understanding, capacity and exercise of ministry.

Universal Training: A standard of training that will foster a culture of safety and inclusion for all people. That includes a broad overview of vulnerability, power, and health boundaries issues. This training is designed to equip all people to live out their Baptismal Covenant.

Specialized Training: A standard of additional training that equips people who participate in or have oversight responsibility for ministries. In addition to Universal Training, a person will have access to specialized training tailored to their role and ministry function.

Vulnerable Individual:
1. Any adult at or older than the age designated as an elder by applicable state law;
2. Any adult who is infirm or diminished in capacity due to age, illness, or disability;
3. Individual who is ministered to in their home (by Eucharistic visitors, pastoral care visitors, Stephen Ministers, or others);

4. Individual who is wholly or partially dependent upon one or more other persons for emotional, psychological, or physical care or support; such dependency may be temporary as in the case of an accident, illness, or birth of a child; or

5. An individual who, by virtue of a crisis, experiences vulnerability leading to a dependency on another or lacks agency in a pastoral relationship, as in the wake of the death of a family member or job loss.

6. Vulnerable Adult

Youth: Anyone who is at least 12 years old but not yet 18 years old, or who is 18 years old or older and still in high school.[4]

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[4]1 Ages established in accordance with generally accepted definitions in the United States. These ages may vary across the wider Episcopal Church.

II. EXPECTATIONS AND LOCAL IMPLEMENTATION

Policy on Sexual Misconduct

The Diocese of North Carolina strictly prohibits harassment and sexual misconduct by any ordained person, aspirant, postulant, candidate, or seminarian sponsored by or working in this Diocese; and by any lay employee or volunteer working in any capacity for the Diocese of North Carolina, and by any diocesan-related institution or any parish, mission or other congregation/organization in the Diocese of North Carolina.

The diocese has adopted a tiered system of training modules, depending upon the level of contact with members and the ministry in which the person serves. Please refer to Appendix B on pp. 40-42 to locate the training modules for each ministry position.

Recognizing that sexual abuse, exploitation, and harassment are all clear violations of the promise in the Baptismal Covenant to "respect the dignity of every human being," it is the responsibility of church workers to do all they can to make the church a safe environment. Activities that are harmful to others physically, emotionally, or spiritually are simply not permitted.

* For further clarification about which level of training is required, please refer to "Screening and Training Protocols" (Appendix A on p. 40).

III. APPLICATION AND SCREENING

The diocese and all diocesan Sponsored events are required to screen all persons according to the standards in the Screening and Training Standards" (Appendix A). Congregations and other organizations are strongly encouraged to follow these same policies for screening to the extent possible. For some positions, screening consists only of a public records check. For other positions, there are additional screening requirements of a written application, interview, and reference verification

A. Public Records Checks

1. Congregations and other organizations should use a provider approved by the diocese to conduct public records checks. Such checks must be completed before the employee or volunteer begins serving.
2. Criminal public records checks should include all available criminal records and sex offender registries.
3. A Department of Motor Vehicles (DMV) records check (https://www.ncdot.gov/dmv/online/records/) is needed if transporting children, youth, or any vulnerable adult as part of, or an extension of, ministry of the church or for a church-sponsored event.
4. A credit check is required for treasurers and those with check-signing authority.
5. Public records checks must be updated at least every five years.

The Diocese currently uses ActiveScreening Faith, our suggested resource for public records and criminal records checks.

B. Written application, interview, and reference verification are required before serving in certain roles and ministries as specified in   Screening and Training Protocols" (Appendix A). Where required, these components are generally conducted in the following order:

1. Submission of a completed written application to serve in a specified role with a clearly defined written job description. The application includes verifiable personal information;
2. Personal interview; (Samples: 10 Interview Questions You Need To Ask For Church Jobs or Asking the Right Questions);
3. Reference verification conducted by congregations and other Organizations to verify personal information and check references [people who know but are not related to the applicant] listed in the application; and
4. Maintenance of these records is described below.

Potential Leaders or Supervisors should be known and active in the congregation for at least six months before engaging in ministry with children and youth according to the "Screening and Training Standards" (Appendix A).

Dioceses, congregations, and other organizations should keep and maintain all application and screening records secure and confidential in the Diocese, congregation, or organization s office. This includes a signature by each participant verifying receipt of a copy of this policy, including any local procedures or variations.

In the case where an individual either self-identifies as or criminal records indicate he or she is a sex offender, it is best to consult with the rector or priest-in-charge about how to address this person's involvement in the church. The rector or priest in charge may want to consult with the diocesan Pastoral Response Team or a Certified Sex Offender Treatment Specialist. It is necessary to keep this information confidential for the respect and dignity of the individual in question. It is also our aim to allow for all members of the Body of Christ to participate in ministry while also maintaining a safe and secure environment for others, especially children, youth, and vulnerable individuals. In no case should someone who self-identifies or has a criminal record as a sex offender be allowed to work with children, youth, or vulnerable adults.

IV. EDUCATION AND TRAINING

Training should be appropriate to each person s function according to the Screening and Training Standards" ([Appendix A](#)). Refer to [Appendix B](#) for expectations regarding who should receive this training. The Safe Church, Safe Communities Training is available through a partnership with the Church Pension Group and Praesidium Academy

All leaders shall have Universal Training that fosters a culture of safety and inclusion for all people and covers a broad overview of issues of vulnerability, power, and healthy boundaries. Universal Training is designed to equip all people to live out their Baptismal Covenant. All members of the Diocese of North Carolina should have access to this training.

In addition to Universal Training, all Supervisors and those with oversight responsibility for ministry programs and/or other adults who engage in ministry with children, youth, and vulnerable adults shall have Specialized Training that is tailored to their role and ministry function.

Depending on role and responsibility, Specialized Training should include:

- Prevention, identification, and response to all forms of abuse and neglect; including financial exploitation;

- Vulnerability within the pastoral relationship;

- An introduction to gender non-binary

- The needs of LGBTQ+ children and youth;

- The needs of aging LGBTQ+ individuals who often struggle to find care or residential facilities adequately equipped to meet their needs;

- The ways that children, youth, and vulnerable adults can engage in self-advocacy;

- The needs of differently-abled children and youth; and

- Mandated and voluntary reporting of suspected abuse, neglect, and exploitation of vulnerable adults.

Certification of training shall be renewed every three years.

Dioceses, congregations, and other organizations with responsibility for programs with services or ministries to children, youth, and vulnerable adults shall keep records sufficient to evidence compliance with this policy.

V. MONITORING AND SUPERVISION OF PROGRAM

All people who minister to adults, children and youth should have ongoing supervision and should be monitored to ensure appropriate behavior and healthy boundaries. Ongoing supervision should consist of regular check-ins by the Supervisor, who may be parish clergy or a team leader. Such supervision should review the scope, accountability, and responsibility of the ministry with the person engaged in the ministry. Each person engaged in such ministry should know who supervises their ministry and how to contact the Supervisor at all times.

Parishes should keep records of those individuals who work with, supervise, or volunteer with the children and youth ministry of the congregation. This list should include contact information for the individuals listed and be kept in a parish s office or another place where records are kept.

Adults ministering to vulnerable adults outside of the church should document their visits, including time, place, and any observations or concerns. Such documentation should be reviewed by the supervisor. Confidentiality among clergy and lay ministers is required, and all documentation must be kept confidential. This documentation promotes continuity of care and transparency in the ministry.

A. Unrelated Adults Required
1. There should be a minimum of two unrelated adults (at least two years older than the eldest participant) present at ministry settings and events designed for children and youth. If unanticipated circumstances result in an adult being alone with children or youth, that adult should report those circumstances to the supervisor, clergy-in-charge, senior warden, or responsible person immediately.
2. One adult may be sufficient in a well-monitored, visually accessible program space on the church grounds, such as a Sunday school classroom, provided that another adult can maintain visual contact with the adult program leader. This can be accomplished by designating an individual to conduct frequent random checks of classrooms and unlocked spaces throughout the building(s). When this is the case for one or more of your program offerings for children or youth, the circumstances must be specifically described in a written document and approved by the congregation's governing body. See also sections regarding "Overnight Programs" and Transportation." On pp. 29-31.

3. While not required, it is best practice for those ministering to vulnerable adults, or in the homes of others, to do so with another trained, ministering adult present.

B. Creating Safe Space for Children and Youth

To create a safe space, it is necessary to anticipate and avoid circumstances in which children and youth are exposed to inappropriate consumables, materials, unmonitored adult contact, or unsupervised peer contact. For example:

1. Alcoholic Beverages—Alcohol (sacramental or otherwise) should not be stored in publicly accessible areas of the church buildings.
2. Computers and Electronic Devices—Children and youth should have adequate supervision when using electronic devices belonging to dioceses, congregations, and other organizations. Devices should have adequate password protection. Each user should have their own account and password. See Appendix C: Recommended Practices and Guidelines for Social Media and Electronic Communications."
3. Persons with Keys and Access to Locked Spaces—Anyone with keys or electronic access to church buildings should meet all the requirements for screening and training according to Screening and Training Standards" (Appendix A).
4. Unused Spaces—Spaces not in use should not be readily accessible to unauthorized persons. Given the vast differences in facilities, each diocese, congregation, and other organization should determine how best to meet this standard.
5. Safety in Play:
   a. All games should be reviewed for appropriateness regarding bodily contact, physical and emotional safety, and familiarity of the group.
   b. Safe Environment: Leaders should assess the space for games concerning safety. Are there rocks or holes in the field? Check to be sure there is adequate lighting and space. What are the limitations of the facility?
   c. Inclusive Versus Exclusive/Familiarity of the Group: Leaders should assess the game(s) concerning how inclusive the game is for individuals in the group.
   d. What are the physical limitations of the members of your group? Are participants eliminated, and for how long? How well do the participants know each other
   e. Purpose and Goals: Leaders should assess the games for their overall purpose. What are you trying to accomplish: getting the group to know each other, building community, or perhaps just releasing energy? How can the game relate to the overall theme of the program? How can you process with the group to evaluate what they have learned from the experience?
   f. Evaluating the Appropriateness of Certain Games: Those in ministry today should assess the appropriateness and safety of all aspects of ministry, including fun activities. Some things to consider are:

   i. How much bodily contact is there, and is the contact appropriate?
   ii. Does the activity stigmatize one group, race, or culture?
   iii. Does the activity pose an unnecessary risk of harm to anyone?
   iv. Does the activity allow for equal participation of all participants?

6. Creating Safe Space for Pastoral Relationships and/or Ministry with Vulnerable Adults:
To create a safe space, it is necessary to anticipate and avoid circumstances that could result in the exposure of vulnerable adults to undue influence or exploitation. On-site and off-site settings for ministry with vulnerable adults and pastoral relationships and conversations should do the following:
   a. Be in places where casual monitoring by others is convenient;
   b. Convey safety and comfort.

C. One-to-One Pastoral Meetings

1. When one-to-one conversations occur between an adult and a child or youth, another unrelated adult is to be either present or capable of visually monitoring the conversation. Examples include the following:
   a. planned or unplanned on-site conversations can take place in a public location, away from where others can hear but in view of other adults; and
   b. planned off-site conversations/meetings can take place in a public place (such as a coffee shop or restaurant) in view of other adults. A responsible person should be informed about the appointment or plans in advance.
2. Confidentiality cannot be guaranteed if a child, youth, or adult discloses a situation pertaining to abuse, neglect, self-harm, or exploitation because of mandatory reporting laws.
3. Impulsive, secluded, or secretive activity, online or in person, with children or youth may foster a high-risk situation and should therefore be avoided. See Appendix C: "Recommended Practices and Guidelines for Social Media and Electronic Communications."
4. When one-to-one conversations occur between adults for pastoral care, they should meet in a space visible to others, while maintaining confidentiality. These meetings should be scheduled when others are present at the parish or meeting location. It is recommended that these one-to-one meetings not exceed more than three meetings; if more counseling is needed, the person should be referred to a professional counselor.

D. Basic Needs
No one is to be deprived of the basic human needs of food, water, shelter, sleep, access to restrooms, safety, and clothing at any event.

Exceptions may be made for programs intended to teach about poverty, need, and hunger, such as an intentional fasting program. In these cases, participants must agree to their participation in writing, and parents or guardians of minor participants must give written permission that includes a certification that the youth or child does not have a medical condition that would put the participant at risk by fasting or missing sleep. Participants who wish to withdraw or cannot complete the program must have their basic needs met immediately.

E. Inclusiveness

No one should be denied rights, status, or access to an equal place in the life, worship, and governance of any program or activity because of race, color, ethnic origin, national origin, marital status, sex, sexual orientation, gender identity and expression, differing mental and or physical abilities, or socioeconomic class. To the furthest extent possible, all spaces and settings for programs, activities, and ministry should be accessible.

The Episcopal Church seeks to support all adults, children, and youth by providing reasonable alternative arrangements to address safety and comfort regardless of state law.

Transgender, genderqueer, or gender non-binary adults, children, or youth who express the need or desire for increased privacy should be provided with reasonable alternative arrangements. Reasonable alternative arrangements may include using a private area, a separate changing schedule, or a single-stall restroom or shower. Any alternative arrangement should be provided to protect the adult s, child s or youth s ability to keep their transgender status confidential. They should not be required to use a locker room or restroom that conflicts with their gender identity.

Exceptions to bathing policies may apply for overnight stays involving individuals with differing mental or physical abilities. These situations may require a trained adult to assist with lifting, bathing, and drying. During HUGS diocesan summer camp, helper campers are assigned to assist a camper (someone with limited mental or physical abilities), and an adult counselor must be present during this time. Permission for this kind of assistance must be given by the participant, parent, or guardian when applicable.

Safe bathroom/shower facilities will be provided by gender (or specific times will be assigned to the use of a single facility).

Adults should either have separate shower facilities or shower at other times than the youth. Separate dressing facilities should also be provided. See the section on Overnight Programs, pp. 29-30."

F. Violence and Weapons

The Episcopal Diocese of North Carolina recognizes the increased violence in our schools and churches throughout the United States. The safety and well-being of God's people remain among our highest priorities. The diocesan properties have been identified as gun-free zones, and parishes have been encouraged to formulate policies for themselves.

The diocesan children's and youth ministry department continues to prohibit any weapon, including pocket knives, at diocesan events.

 In addition:

1. No one is to strike, hit, or otherwise physically threaten or harm anyone at any time.
2. Bullying of any kind by anyone is prohibited.
3. No one is to control or attempt to control another by bullying, intimidation, threats, verbal or emotional abuse, or isolation from others. Bullying of any kind by anyone is prohibited.
4. Children and youth should not have weapons of any kind at any event or program for children or youth. Exceptions to this restriction may be made for camp programs or other specific programs with prior approval.
5. Report suspected violations immediately. See Suspected Violations of This Policy."

G.   Behavioral Standards for Adults in Ministry with other Adults, Children, and Youth

All who work with vulnerable adults are expected to model patterns of healthy relationships. To this end, lay and ordained ministers working with vulnerable adults should do the following:

1. Take care not to unduly influence a person to whom they minister;
2. Accept only token gifts from those to whom they minister. Ministers given gifts should report those gifts in writing to their supervisor, clergy, senior warden, or responsible person;
3. Decline to accept loans of any kind from those to whom they minister;
4. Decline to agree to be named as a beneficiary or to act as an administrator or executor in the will of anyone to whom they minister; and
5. Inform the supervisor, clergy, senior warden, or responsible person of anything that causes concern for the safety or well-being of those to whom they minister.

Adults are encouraged to do the following:

1. Have ongoing spiritual practices, which might include daily prayer, regular participation in corporate worship, and Bible study;

2. Spend time with and listen to vulnerable adults and advocate for their ministry within the Body of Christ;

3. Offer appropriate physical expressions of care when permission is granted for such contact, which may include:
   - high fives and fist bumps;
   - hand-holding while walking with small children or in prayer;
   - brief touching of shoulders, hands, or arms;
   - "laying on of hands" under appropriate pastoral supervision;
   - brief hugs and arms around shoulders; and

4. Model appropriate affection with other adults and be accountable to the community for behavior.

   DO s All who minister to vulnerable adults are encouraged to:

   - Offer appropriate physical expressions of affection, as long as they are welcomed by the recipient. These may include:
     - brief hugs;
     - pats on the shoulder or back;
     - kisses on the cheek;
     - handshakes;
     - holding hands during prayer; and

5. Maintain healthy boundaries when sharing personal information.

Adults who work with children and youth are expected to model the patterns of healthy relationships that children and youth deserve in all settings. Interactions should meet all requirements outlined above, and adults should be discouraged from initiating a private relationship with any unrelated child or youth from the church away from sanctioned church activities.

Adults should not, under any circumstances, do the following. Anyone who suspects a violation of these policies should take steps as outlined in Section VI. Responding to Concerns.

1. Provide children, youth, or vulnerable adults with marijuana, non-sacramental alcohol, drugs, cigarettes, tobacco products, e-cigarettes, vapes, or pornography;

2. Arrive under the influence of alcohol, illegal drugs, or misused legal drugs at any children s or youth event or when they are responsible for children, youth, or vulnerable adults;

3. Consume non-sacramental alcohol or illegal drugs or misuse legal drugs at any children s or youth event or when they are responsible for children, youth, or vulnerable adults;

4. Engage in illegal behavior or permit other adults, children, or youth to engage in illegal behavior;

5. Engage in any sexual, romantic, illicit, or secretive relationship or conduct with any children, youth, and vulnerable adults;

6. Apart from planned, pre-approved educational programs, discuss their own sexual activities, fantasies, or use or abuse of drugs or alcohol with children, youth, or vulnerable adults.

H. Visits to Private Residences

The safety of all persons and healthy boundaries are essential when visiting any person in their private home, especially vulnerable individuals.

When visiting with someone in their home or away from the church property, there are some best practices that will keep you and those you visit safe.

1. Always let the church office know whom you are visiting, when, and where the visit will occur.

2. Parishes should develop a policy for notifying the church office, the rector, or the vicar. The policy should include how home visits will be assigned and how they will be recorded in the church office.

3. Visits should be made with two or more individuals whenever possible. When a single individual is to make a visitation, he or she should notify the church of the departure time and end of the visit timing.

4. When you are visiting with someone away from the church, always notify them that you will be stopping by.

5. When the person you will be visiting has dementia or is under the care of someone else, notify the person s next of kin or caregiver of your visit. It is helpful for the family if you leave a note indicating that you have been by with a contact number in case they have any questions.

6. When visiting the elderly or those who have caregivers, make certain to ask pertinent questions about their care and if they need anything. Some signs of improper care may include:
   a. Bruising, sprains, broken bones:
   b. Burn marks:

    c. Recurring injuries or unexplained injuries:
    d. Poorly treated injuries:
    e. Dehydration, weight loss or weight gain, malnutrition:
    f. Fear of caregivers:
    g. Unsafe or unclean environment:
    h. Soiled clothing"
    i. Poor hygiene: or
    j. Bed sores or skin rashes.

7. It is not your responsibility to take anyone to the bathroom.
8. Do not offer to assist with any financial needs.
9. Report any questionable bruises or injuries to your priest and follow up to see that some action has been taken.
10. Contact your local Adult Protective Services to report any suspicion or documented abuse. Avoid situations that might compromise privacy; common examples of this include the following:
    a. Visiting behind closed bedroom doors;
    b. Sitting on the bed of the person being visited; or
    c. Visiting a person while they are not fully clothed.

The best practice is to visit in teams of two or more. If it is not possible for another ministering adult to be present, a member of the vulnerable adult s household should be present. If neither is possible, documentation of the time, duration of visit, general matters discussed and any pastoral concerns should be provided to the supervisor as soon as possible after the visit.

I. Visits to Residential Facilities

The safety of all persons and healthy boundaries are also essential when visiting a vulnerable adult in a residential facility. Best practices include the following:

1. Facility staff should be informed of the visitor s presence;
2. If a visit takes place out of sight of staff, they should be notified in advance and informed when such meeting is concluded;
3. The door to a resident s private room must remain open during visits;
4. Visitors should be mindful that LGBTQ+ residents may not be safe to express their sexual identity or orientation, as staff members may not yet have been trained; and
5. In the event of uncertainty about applying this policy, the visitor is encouraged to contact their supervisor with relevant queries.

J. Best Practices Working with Infants, Toddlers, and Preschoolers:

For all diocesan-sponsored programs, there must be two, unrelated adults present or within eye view of interaction with children; congregations and other organizations are strongly recommended to adopt this practice to the extent possible. Teenagers and youth are not adults. Congregation staff workers, including those who work in the Nursery, must have Safe Church training.

Diaper Changing, Bathroom, and Other Touching Issues:
1. Diapers must always be changed in an open area where a second adult can see. Gloves should be available and worn by the adult changing the diaper. Diapers should be disposed of in a container that toddlers cannot easily access.
2. Both adults should be in view when children need assistance using the toilet (potty training). A door should never be closed with a child and adult alone, even in a bathroom.
3. For preschoolers who still need some help with buttons or zippers, the adult should stand outside the bathroom facing away from the child. If assistance is needed, always ask for permission to assist. Report all incidents to the parent or guardian.
4. Always tell the parent when they come to get their child, whatever bathroom assistance was required. Examples: I changed Carol s diaper twice this morning." / Anne used the potty with assistance" or Anne went to the bathroom by herself, but I helped her with her button." / Jack used the potty while I waited by the door." This prevents misunderstanding if a child says something about an adult touching or seeing parts of their body or underwear.
5. Physical Contact: Young children are naturally affectionate, especially when seeking comfort. Unless a child is in danger to him- or herself or others, physical boundaries are to be respected. Never force physical contact with a child or initiate close physical contact with a child. If a child does not wish to be held or touched, then that is to be respected.

Here are some guidelines to help with what is appropriate by age:
1. Holding or carrying an infant, even when the child seems fussy or angry, is appropriate for a prolonged period of time.
2. For toddlers and preschoolers, hand-holding is always appropriate.
3. Child-initiated hugs are appropriate.

4. Toddler- and preschooler-initiated sitting on the lap for short amounts of time is appropriate, provided the adult is wearing appropriate clothing for the activity, and the child is fully clothed.

Not appropriate touching includes:
1. Carrying the child (unless for comfort or hurt); avoid prolonged carrying.
2. Touch on areas normally clothed (stomach, thighs, breast, or gentiles.]
3. Prolonged sitting on lap (every time adult sits) or adult requests child sits on lap.
4. Massaging.

Clothing & Dressing issues:
1. Children this age will sometimes undress themselves on a whim. Try to intervene and redirect when possible. If a child does this, please report it to the parent when they come to get their child.
2. If an adult must assist a child in changing clothes (the child spills a drink on clothing or has a bathroom accident), report this to the parent when they come to get their child.
3. Always assist with changing clothing as if it is a bathroom issue (two adults in view).

K. Special Considerations for Off-site Programming

Off-site programs, trips, and events are a welcome and often necessary means for the spiritual, social, and emotional development of children, youth, adults, and vulnerable individuals. They also present additional challenges for maintaining best practices for safe and healthy ministry. As described above, the expectations for safe space should be observed off-site.

In the event of uncertainty about policy application, the responsible person should contact their supervisor with the relevant queries. Because of unique risks that can t always be anticipated, obtaining permissions and managing documentation is important, as described below.

1. Prior Approvals
   b. Prior approval by the governing body and the clergy-in-charge is recommended, and that approval should be reflected in the minutes of the governing body. Diocesan-sponsored programs, trips, or events should receive prior diocesan approval.
   c. These same prior approvals are required when the site is a private residence hosting such events as cookouts, progressive dinners, et cetera.
   d. Written parental approval is required before viewing any movie, whether off-site or on-site, rated PG-13" or above, or participating in any conversation or program containing sexually explicit or violent content.

e. These same prior approvals are required when the site is a private residence hosting such events as cookouts, pool parties, progressive dinners, et cetera.

In the event of uncertainty, the responsible person should contact the priest with the relevant information. If this is a diocesan program, the bishop should be contacted.

L. Registration, Waivers, and Release Forms

1. All participants (children, youth, or vulnerable adults) should complete and sign a registration, waiver, and release before participating in any program. Confidentiality must be preserved concerning medical information. [Sample <u>Consent and Liability Form</u>] Such forms can encompass a program year.

a. There should be a signature on all release and waiver forms. If a person cannot consent due to age, impairment, or lack of agency, then the signature of that person s guardian, spouse, or other trusted family member is required. [<u>North Carolina does allow digital signatures.</u>]

b. Completed release and waiver forms should be maintained in a secure location on-site. These records should be kept securely at the church or diocesan office for seven years. (<u>Records Management for Congregations: An Archives Manual for Episcopal Parishes and Missions.</u>)

c. Permission slips should be provided for each event and should be signed by the responsible adult, guardian, spouse, or other trusted family member.

2. Prior permission for an individual to be photographed or recorded on film, videotape, audiotape, or other electronic media is required.

M. First Aid and Medications

Current certification in First aid, CPR, and automated external defibrillator (AED) operation is strongly encouraged for those who work with children, youth, and vulnerable adults.

1. A first aid kit, appropriately stocked for the event and participants, should be available in an easily accessible location. [<u>Red Cross First Aid List</u>.]

2. A record must be kept for all medication or first aid given to a participant. This record should include the participant s name, the date and time of service, the name of the person administering the medication or treatment, and a description of the medication, dosage, or treatment that was given. [Samples: <u>Medical Treatment Form</u>]

3. Unless a registered nurse is responsible for distributing medications to participants, all medications (prescription and over-the-counter) belonging to minors should be kept by the participants. Exceptions may include including vulnerable individuals

at an event where no registered nurse is available. Parents' or guardians' permission must be given to a responsible adult to administer medications.

4. Only the responsible person, or their adult designee, should administer medications.

5. Any prescription medications administered by paid staff or volunteers to a participant must be in the original container with the prescription label intact. The label must include the participant's name, the name of the medication, the correct dosage of the medication, and the frequency of administration.

6. Any over-the-counter medications administered by paid staff or volunteers to a participant must be accompanied by instructions with similar information: name of the medication, correct dosage, and frequency.

7. If a vulnerable adult requires assistance with medications of any type, then a record must be kept for all medication or first aid given to a participant. This record should include the participant s name, the date and time of service, the name of the person administering medication or treatment, and a description of the medication, dosage, or treatment that is given.

All medications (prescription and over-the-counter) belonging to vulnerable adults requiring assistance with medications should be given to the Responsible Person unless otherwise agreed upon.

N. Insurance

All trips to off-site destinations should have adequate insurance in case of emergency. The responsible adult coordinating the trip should check the coverage of the parish's insurance and consider purchasing additional insurance, especially for overseas trips.

O. Supervision

At any gathering of children or youth, there should be at least two unrelated adults, with one being at least three years older than the oldest participant, preferably reflecting the sex and gender identity of the participants.

Minimum ratios of adult to children and youth should be:

Age	Day Time	Overnight
Five Years Old or Younger	1 adult for every 6 children	1 adult for every 5 children
Six to Eight Years Old	1 adult for every 8 children	1 adult for every 6 children
Nine to Fourteen Years Old	1 adult for every 8 children or youth	1 adult for every 7 youth
Fifteen to Eighteen Years Old	1 adult for every 8 youth	1 adult for every 7 youth

Additional adults can provide skills, mentorship, support, encouragement, and spiritual guidance. In circumstances where you have new leaders-in-training, the leadership team should also have a reasonable number of experienced adult leaders to provide support.

P. Overnight Programs

In overnight programming, particular attention will be given to historically excluded or unrecognized people, such as LGBTQ+ and differently-abled individuals. In a situation of unequal power and safety, the preferences of these individuals merit additional consideration, accommodation, and action to ensure:

- Participant privacy;

- Maximization of social integration of all participants;

- Minimization of stigmatization of any participants;

- Equal opportunity to participate; and

- Safety of all participants.

Other guidelines for overnight programs are outlined below.

1. All participants' safe use of restrooms and showers requires dioceses, congregations, and other organizations to consider numerous factors, including, but not limited to, age, sex, gender identity, expression, and privacy. Adults should have separate showers or separate times for showers.
2. Overnight programs should provide safe, supervised sleeping arrangements.
   a. No bed, cot, or sleeping bag should have more than one person sleeping in it.
   b. Supervision by two unrelated adults is required in any space where one or more youth are sleeping.
      a. Supervision includes two unrelated adults sleeping in the same or adjacent room.
   c. When the overnight location is such that there are limited areas to house participants, it is acceptable for all participants (both male and female youth and adults) to sleep in the same open area when dressing rooms and bathrooms provide appropriate privacy for changing and other needs.
      1. It is recommended that an area of the room be reserved for female youth and another area for male youth.

2. The adult sleeping area is recommended to be used as a barrier between the female and male sleeping areas.

3. Participants should have access to three substantial meals each full day and access to sufficient water.

4. Participants should be allowed at least seven hours of sleep each 24-hour period, except for programs where parental/guardian permission is given to missing sleep. In these cases, children and youth must agree to participate in writing, and parents or guardians must give written permission that includes a certification that the youth or child does not have a medical condition that would put the participant at risk by missing sleep.

5. Participants should have some time set aside each day for rest or free time.

Best practice guidelines for hotel stays include the following:

1. One child or youth per bed, including cots, pullouts or hide-a-beds, and rollaway beds;

2. At least two children or two youths in each room;

3. Adult supervisors or chaperones have rooms on the same floor, scattered among the rooms containing children or youth, and at least one adult room is by the stairs or elevators; and

4. The adult leader assigns rooms and room occupants.

Q. Transportation

For the health and safety of all participants, the following practices should be followed.

1. For diocesan-sponsored events, drivers must be at least 24 years of age, provide proof of insurance, a current driver s license, and a completed volunteer driver information form, and have a satisfactory DMV records check. It is strongly encouraged individual parishes and missions adopt this policy to the extent possible.

2. All drivers should complete a driver's information form (Sample: Transportation of Children and Youth), and a copy of their insurance card should be made and kept on record.

3. All drivers and riders must comply with state laws, including seat belts and cell phone usage.

4. Parents or guardians are responsible for the transportation and safety of their children, youth, or vulnerable adult to and from the event. This responsibility includes the transportation of any other passengers in their vehicle.

5. A list of those approved to provide transportation to children, youth, or vulnerable adults should be maintained in the organization's office.

6. Anyone being transported must consent to such transportation beforehand. If a person cannot consent due to impairment or lack of agency, then prior approval by that

person s guardian, spouse, or other trusted family member is required.

NOTE on 15-PASSENGER VANS: Some churches own 15-passenger vans, and many others rent them for various trips with children and youth. Each church should check with its insurance company as to its policy on the use of 15-passenger vans. All who use 15-passenger vans should review safety precautions as found in the Resource Section.[5]

R. Camps and Retreat Centers

All camps, camping programs, and retreat centers of the diocese should follow the guidelines for off-site programming established in this policy on pp. 29-30. In addition, camps should aim to follow American Camp Association standards to the best of the camp s ability.

Events held at other camps and conference centers must follow all the procedures outlined in this manual.

S. Travel

Travel with children, youth, and vulnerable adults present amazing opportunities for participants to experience the church and the world on a larger scale with vastly different perspectives of faith communities and their contexts. It also presents challenges to normal safety protocols and opportunities for creativity if managed well. The following policies will help groups prepare for a variety of potential scenarios, as well as for domestic and international travel.

1. Adult Leaders and Chaperones: Minimum ratios of adults to youth need to be greater due to the possibility of leaving an adult behind with a participant in the event of a medical emergency. For youth ages 9 to 14 years, there should be at least one adult for every 5 youth; for those ages 15 to 18, there should be at least one adult for every 7 youth.

2. Regardless of group size, no group should travel with fewer than two adult chaperones. One adult of a minimum age of 25 should serve as the travel administrator who is responsible for all aspects of the trip, including carrying all necessary documentation, contacts, and forms. The first four items below include links to documents used by diocesan youth missioners, easily adaptable to parishes:

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[5] *15-Passenger van safety guidelines*. (n.d.). Brotherhood Mutual Insurance Company. Retrieved November 28, 2022, from https://www.brotherhoodmutual.com/resources/safety-library/risk-management-articles/vehicles-and-drivers/vans/15-passenger-van-safety-guidelines/

    a. <u>Medical Registration Form</u>;
    b. <u>Consent and Liability Form</u>;
    c. <u>Media/Photo Release Form</u>;
    d. <u>Community Covenant</u>;
    e. Emergency contacts; (on our Consent Form and the Medical Form)
    f. Itineraries; and
    g. Cash or credit card capacity to address emergencies.

3. It is a best practice that one adult of a minimum age of 24 should hold a current medical certification to manage the administration of necessary and permissible medications; administer immediate and necessary first aid, and judge medical situations to determine if the care of an individual needs to be taken to a higher level of care. When this is not possible, one person should be designated to supervise the administration of medications as instructed on medical release forms and to identify a clinic or trauma center near the destination to be able to respond to health emergencies as rapidly as possible. Acceptable medical certifications include the following:
    a. <u>Wilderness First Aid | First Aid Training Courses</u>;
    b. <u>American Red Cross First Aid Online Classes</u>
    c. <u>Outdoor Emergency Care</u>;
    d. <u>Emergency Medical Technician/paramedic</u>;
    e. Nurse—RN/LPN / nurse practitioner;
    f. Physician s assistant; and
    g. Medical doctor.

    The best practice is to designate an adult to serve as back-up to the travel administrator and as back-up for simple first aid and administration of prescriptions. This could be the same person. A copy of all documents should be left with an accountable person at the diocesan, parish, or organization office.

4. Insurance for Travel Overseas Pilgrimages and Mission Trips
    a. Short-term trip or supplemental insurance, available through most church and organization policies as an added rider, must be secured at least one month before travel. For international travel, allow at least 3-5 months.
    b. It is recommended that all travelers carry evidence of personal health insurance by virtue of a copy of the actual card provided to the insured person.
    c. Because not all individuals have access to affordable and adequate health insurance, it is recommended that health insurance be added to trip insurance.
3. Other International Considerations
    a. Check-in with the <u>U.S. Department of State on Travel</u> requirements, including visas.

b. Ensure that each traveler s passport is valid for at least six months beyond your return date.

c. Determine whether or not vaccinations are required or recommended for entry into specific countries. [Center for Disease Control and Prevention]

d. Arrange to have at least two cell phones with the group that will have active coverage in the destination(s). Make a backup plan for communication with the responsible person at home.

e. A more thorough list of international travel considerations with links to U.S. and global organizations can be found in the Youth in Mission Manual.

VI. RESPONDING TO CONCERNS

A. Suspected Abuse of Adults/Elderly/Vulnerable Adults

In the Resource Section, you will find articles and links to information on signs of abuse and what to do if you suspect abuse. North Carolina law protects disabled adults and the elderly of any age from abuse, neglect, and exploitation. The law states that all persons are required to report when they "have cause to suspect" that a senior and/or disabled adult is abused, neglected, or dependent. Reporting can be done through the local office of the NC Division of Social Services, Adult Protective Services.

B. Suspected Abuse, Neglect, or Exploitation of Children and Youth

Any adult with reason to suspect that abuse, neglect, or exploitation of children or youth has taken place is required by NC law to report such suspicion to the local office of the NC Division of Social Services.

C. Additional Reporting to Diocesan and/or Pastoral Leaders

In addition, anyone who has reason to suspect that abuse, neglect, or exploitation of children, youth, adults, or vulnerable individuals has taken place within a facility or program of the Diocese, congregation, or other organization, must immediately inform one or more of the following:

1. Diocesan Pastoral Response Team;
2. Bishop or the bishop s office in the case of a Diocese;
3. Clergy-in-charge or the senior warden in the case of a congregation;
4. Director, head, or other governing officer in the case of other organizations; and/or
5. Pastoral Response Team in any case where a clergy member is suspected of abuse, neglect, and/or exploitation.

D. Suspected Violations of this Policy

Anyone who suspects a violation of these policies must immediately report the violation to the responsible person, clergy-in-charge, or senior warden.

Clergy-in-charge receiving reports of violations of this policy are responsible for providing appropriate pastoral care to all those affected and appropriate remedial or disciplinary action up to and including termination of employment or unpaid ministry with the church. If the responsible person is a lay person, they are responsible for ensuring that appropriate pastoral care is provided for all.

Anyone who knows of a violation of these policies by a clergy member must immediately report the violation to the bishop s office or the intake officer. Anyone can make a report to an intake officer.

The bishop, hearing reports of violations by clergy, or by laity at diocesan events, is responsible for providing appropriate pastoral care to all those affected and appropriate remedial or disciplinary action, up to and including canonical disciplinary action, as provided by Title IV of the Constitutions and Canons or termination of employment or termination of any volunteer ministry with the Diocese.

F. Local Resources for Response

Each Diocese, congregation or organization should provide a list of local resources that can give information and assistance to anyone concerned about circumstances that may violate this policy. Such resources with contact information should include the following:
1. Responsible person(s) for programs and ministries with children, youth, adult or vulnerable individual
2. Clergy in charge of a congregations;
3. Wardens;
4. Bishop;
5. Intake officer(s);
6. North Carolina Division of Social Services; and
7. North Carolina Adult Protective Services.

VII. POLICY ADOPTION, IMPLEMENTATION AND AUDIT

A. The Episcopal Church Adoption and Implementation

The Episcopal Church shall ensure that all programs and events of the Episcopal Church involving children, youth, and vulnerable individuals comply with the standards set out in the model policies.

B. Congregation and Organization Adoption, Implementation and Audit

Congregations and organizations are strongly encouraged to adopt these *Safe Church, Safe Communities Best Practices* to the extent possible.

New policies will be implemented diocesan-wide by January 1, 2023, and congregations should and are strongly encouraged to adopt a new policy or update their current one by the Annual Diocesan Convention held in 2023.

Where permitted by their governing body, congregations and organizations may adopt site-specific variations from this model policy, which should be described in detail, including the circumstances under which those variations are to be permitted and their rationale. This approval should be recorded in the minutes of the vestry or governing body.

The *Safe Church, Safe Communities Best Practices* should be posted where activities occur and should be given to all adults, guardians, and all paid and unpaid persons who minister to children or youth. The Best Practices may be delivered electronically to those serving in congregational ministry. These policies should include the names and phone numbers of the clergy-in-charge, the senior warden, and a contact person in the bishop s office.

C. **Safe Church Audits**

The Diocese will conduct a Safe Church Self-Audit every three years to confirm compliance with diocesan safe church policies. Congregations and ministries of the Diocese are required to conduct a Safe Church Self-Audit annually to confirm compliance with safe church policies, and to report such audit to the bishop's office. The annual Safe Church Audit Report will be due at the same time as the Annual Parochial Report. The annual auditing process will begin following the end of the calendar year 2023, and will require congregations and other ministries of the Diocese to report:

1. Public records checks, application forms, records of screening, and reference verification of paid and unpaid persons.

2. The names of all individuals serving in the leadership of ministries. Including clergy, staff, children and youth volunteers and workers, lay eucharistic ministers, all elected leadership positions, Stephen's Ministers, tutors, and any other ministry leaders serving. On behalf of The Church.

3. Records of compliance with Screening and Training Standards of paid and unpaid. Persons. (Appendix A).

4. Procedures for responding to. Concerns and incidents; and

5. Evidence of compliance with the appropriate training modules for the ministry position in which they serve.

Diocesan Council, with the bishop, strongly encourages individual parishes and missions to adopt the best practices to the extent possible.

VIII. SAMPLE FORMS AND RELATED LINKS

A. SAMPLE FORMS (RECOMMENDED)
   1. Children and Youth Ministry Volunteer Policies/Form;
   2. Community Covenant;
   3. Consent and Liability Form;
   4. Guidelines for Adult Leaders of Children and Youth;
   5. Incident Report Form;
   6. Media/Photo Release Form;
   7. Medical Treatment Form;
   8. Medical Registration Form;
   9. Reporting Abuse, Neglect, or Exploitation of Children, the Elderly, or People with Disabilities; and
   10. Transportation of Children and Youth.

B. HELPFUL LINKS
   1. Red Cross First Aid List;
   2. Brotherhood Mutual: Safety Library; and
   3. ActiveScreening Faith (background checks).

C. RECOGNIZING SIGNS OF ABUSE, DEPRESSIONS AND SUICIDAL THOUGHTS
   1. Children and Youth
      a. Warning Signs of Suicide in Children and Teens;
      b. Warning Signs of Possible Sexual Abuse In A Child's Behaviors; and
      c. Depression in Children and Teens.
   2. Adults
      a. Recognizing Sexual Abuse (The U.S. Department of Justice NSOPW);
      b. The Hidden Health Effects of Sexual Harassment;
      c. 10 Assumptions about Sex Offenders that are Usually Wrong
      d. Signs and Indicators of Adult Abuse (Western Health and Social Care Trust);
      e. Signs of Abuse in Adults; and
      f. The National Domestic Violence Hotline.

D. LGBTQ
   1. LGBT in the Church;
   2. Who are TransYouth Family Allies?;
   3. Trans Youth Equality Foundation;
   4. The National Center for Transgender Equality; and
   5. Transgender Legal Defense and Education Fund.

E. TRANSPORTATION

1. Driver Liability: Who is liable when church volunteers drive for church events?;

2. Make Your Ministry's Transportation Safety A Priority;

3. Follow 15-Passenger Van Safety Guidelines; and

4. National Highway Traffic Safety Administration: 15-Passenger Vans.

F. INCLUSION

1. When Churches Discuss Disability Without Disabled People ...;

2. A Place for All: Inclusion of People with Disabilities;

3. The inclusion of people with disabilities in the church by Barbara Watt;

4. Disability Inclusion Resources - Everybody's Church Website;

5. 7 Ways Congregations Can Embrace People with Disabilities | HuffPost; and

6. Special Needs Inclusion at Church: Where to Start - Building Faith.

G. MISSION TRIPS/PILGRIMAGE/FOREIGN TRAVEL

1. Episcopal Youth in Mission Manual | Episcopal Church.

H. REPORTING ABUSE (Website Resources)

1. Mandatory Reporting Requirements in North Carolina;

2. Reporting Elderly Abuse in North Carolina; and

3. Prevent Child Abuse North Carolina - Recognizing and Responding to Child Maltreatment.

I. SOCIAL MEDIA

1. Texting Youth in Your Ministry (Video); and

2. Texting with Teens: Sample Policies.

J. BOOKS & ARTICLES

1. Better Safe Than Sued; and

2. Guideline for Ministry Workers.

APPENDIX A - SCREENING AND TRAINING STANDARDS

Ministry Function	Public Records*	App/Inter/Ref**	Module Training***
Clergy	X	X	X
Paid Employees	X	X	X
Contractors (Nursery Workers, Parish Sponsored Preschool, Musicians) This doesn't include plumbers, building maintenance.	X	X	X
Child/Youth Director (Paid & Volunteer)	X	X	X
Youth Group Leaders/Volunteers	X	X	X
Acolyte Leaders	X	X	X
Choir Director	X	X	X
Chartered Committee for Youth		X	X
Home Visitation Team (Stephens Ministers, LEM)	X	X	X
Day Camp Leader (VBS)	X	X	X
Pastoral Care Team	X	X	X
Nursery Volunteers	X	X	X
Parish Nurse	X	X	X
Treasurer	X	X	X
Tutors	X	X	X
Vestry	X	X	X
Youth (Teen) Coordinator, Assistants, Musicians, Camp Staff		X	X
Those with Key Access	X		X

* **Public Records Check** refers to a search of documents and data available to the public, including criminal and civil court records, credit reports, and driving records from the department of motor vehicles. Typically, such searches are conducted by a third party with expertise in this area.

** **App/Inter/Ref** refers to the screening that should be completed before serving in ministry on behalf of the Church. Specifically, a completed application, an interview, and a verified reference check.

*** See Appendix B for the training modules each ministry position must complete. Training must be renewed every 3 years. The modules referenced are those made available through the partnership with the Church Pension Group and Praesidium Academy.

Potential volunteer leaders or supervisors should be known and active in the congregation for at least six months before engaging in ministry with children and youth.

APPENDIX B: REQUIRED TRAINING MODULES
BASED ON MINISTRY POSITION

Clergy/Church Staff/Preschool and School Staff:

- Best Practices for Safe Church: Policies, Procedures, and Resources: Episcopal Diocese of NC

- Introduction & Theological Background

- Organizational Rules & Policies

- Healthy Boundaries

- Power and Relationships

- Abuse and Neglect

- Inclusion

- Pastoral Relationships

- Bullying

- Duty to Report/Reporting

- Anti-Harassment ("For Workers" or both modules, depending on position)
    Sexual Harassment for Managers and Supervisors
    Sexual Harassment for Workers

Those working with children in any capacity (birth to 5th grade):

- Best Practices for Safe Church: Policies, Procedures, and Resources: Episcopal Diocese of NC

- Introduction & Theological Background

- Organizational Rules & Policies

- Healthy Boundaries

- Power and Relationships

- Abuse and Neglect

- Inclusion

- Bullying

- Duty to Report/Reporting

- Anti-Harassment ("For Workers" or both modules, depending on position and supervision of others)
    Sexual Harassment for Managers and Supervisors
    Sexual Harassment for Workers

Those working with youth in any capacity (6 -12th grade):

- Best Practices for Safe Church: Policies, Procedures, and Resources: Episcopal Diocese of NC

- Introduction & Theological Background

- Organizational Rules & Policies

- Healthy Boundaries

- Power and Relationships

- Abuse and Neglect

- Inclusion

- Pastoral Relationships

- Bullying

- Duty to Report/Reporting

- Anti-Harassment ("For Workers" or both modules, depending on position and supervision of others)
    Sexual Harassment for Managers and Supervisors
    Sexual Harassment for Workers

Vestry and other elected positions:

- Best Practices for Safe Church: Policies, Procedures, and Resources: Episcopal Diocese of NC

- Introduction & Theological Background

- Organizational Rules & Policies

- Healthy Boundaries

- Power and Relationships

- Abuse and Neglect

- Inclusion

- Pastoral Relationships

- Bullying

- Duty to Report/Reporting

- Anti-Harassment for Workers

Those making ministry visits:

- Best Practices for Safe Church: Policies, Procedures, and Resources: Episcopal Diocese of NC

- Introduction & Theological Background

- Organizational Rules & Policies

- Healthy Boundaries

- Power and Relationships

- Abuse and Neglect (Only for those who will be making hospital visits)

- Inclusion

- Pastoral Relationships

- Bullying

- Duty to Report/Reporting

- Anti-Harassment for Workers

Tutors (Read WS, may be used by others who Tutor as decided locally)

- Best Practices for Safe Church: Policies, Procedures, and Resources: Episcopal Diocese of NC

- Introduction & Theological Background

- Organizational Rules & Policies

- Healthy Boundaries

- Inclusion

- Duty to Report: Mandated Reporter

Universal Training (May be used for Sunday school subs/those who have building access*)

- Best Practices for Safe Church: Policies, Procedures, and Resources: Episcopal Diocese of NC

- Introduction & Theological Background

- Organizational Rules & Policies

- Healthy Boundaries

- Duty to Report: Mandated Reporter

APPENDIX C: RECOMMENDED PRACTICES AND GUIDELINES FOR SOCIAL MEDIA AND ELECTRONIC COMMUNICATION WITH CHILDREN, YOUTH, AND ADULTS

*The Diocese of NC recommends Universal Safe Church, Safe Communities training for those who hold keys to the church building or have access to the church building.

Social media shapes the lives of young people and has the potential to empower ministry. Behavior in the digital sphere is never private. Posted content may be used out of context and out of the control of the originating individuals and organizations, putting them at risk. In addition, these powerfully connective tools are subject to the same dynamic of unequal power and potential for abuse that present a risk in all ministry relationships. Churches face the challenge of identifying and proactively addressing areas of potential risk in social media use in the midst of rapidly evolving technology. The following recommended practices and guidelines are designed to be a flexible template for developing policies and covenants governing the safe use of social media and digital communication in ministry settings.

A. General Information about Digital Communications

1. All communications sent digitally (email, social networking sites or platforms, notes, texts, or posts, etc.) are NOT CONFIDENTIAL and can be shared or reposted to others.
2. Interactions in the virtual world need to be transparent, that is, occurring in such a way that it is easy for others to see what actions are performed.
3. In the virtual world, healthy boundaries and safe church practices must be adhered to as they are in the physical world.
4. In the virtual world, friend" can mean anyone with whom you are willing to communicate through that medium. In the physical world, a friend can mean much more in terms of intimacy, self-disclosure, mutuality, and expectations for the relationship.
5. Laws regarding mandated reporting of suspected abuse, neglect, or exploitation of children, youth, or vulnerable adults apply in the virtual world as they do in the physical world. Check your local applicable laws.

B. Recommended Practices and Guidelines for Churches and Organizations:

6. Establish a policy that outlines professional and institutional standards for profiles and interactions on social networking sites and platforms.
7. Establish a policy of transparency regarding social media accounts. The best practice is to have the diocese, congregation, or organization create and own" the social media accounts representing the diocese, congregation, or organization, respectively and have multiple administrators and/or supervisors with access. If personal accounts are used, a system of monitoring should be established.
8. Establish a policy regarding the identification or tagging" of individuals in online photos or videos. For example, on Facebook, tagging" someone in a photo or video creates a hyperlink to that person s profile page that can be clicked by anyone. The best practice is for the diocese, congregation, or organization not to identify or tag" individuals. The tagging" of children and youth should be prohibited. When written permission is provided by a parent/guardian, the captioning of photos or videos of minors may be permitted. The caption should not include the minor s full name, nor should it create a clickable link to someone s personal profile. A policy of whether or not an individual can self-tag" in a diocese, congregation, or organization s online photo or video should also be established.
9. A diocese, congregation, or organization is not responsible for reviewing or monitoring the personal pages or groups that are not sponsored by that diocese, congregation, or organization, except as described in #7 above. The preceding statement should be included in the diocese, congregation, or organization s Social Media Policy.
10. Email can be a good method of communication, and it also has the opportunity to be misunderstood. Having a clear understanding and procedure for responding to digital communication that raises concern is prudent for all. Best practices can include not responding immediately and sharing the communication with a supervisor before responding. Phone and face-to-face meetings are preferred when responding to emotionally driven communications or pastoral emergencies.
11. When using photos and videos for ministry purposes, obtain a media release for each person and only post images that respect the dignity of every person depicted.
12. Dioceses, congregations, or organizations must inform participants when they are being videoed because church buildings are not considered public spaces. Signs should be posted that indicate a service or activity will be broadcast when worship services or activities are streamed or distributed on the web or via other broadcast media.

C. Recommended Practices and Guidelines for Interactions with Children, Youth, and Vulnerable Adults:

1. Prudent judgment should be used at the time of day a child or youth is contacted through social media. Under normal circumstances, avoid contacting or exchanging texts, chats, or emails before 8:00 am or after 10:00 pm, unless it s an emergency.
2. Privacy settings and personal boundaries should be implemented.
3. Create and use profiles on social networking sites that meet professional and institutional standards.
4. Do not submit connection requests (such as friend requests on Facebook or Add Me" on Snapchat) to children or youth for personal interactions. Youth may not be able to decline such requests due to the power disparity between youth and adults. Youth may ask to be friends," and adults should discern the nature of contact appropriate for healthy ministry.
5. Apply privacy settings that are consistent with all children and youth, across all social networking sites and platforms. Avoid playing favorites or the appearance of playing favorites.
6. Establish a regular ongoing, and consistent system of review that focuses on settings, accessible content, photos, and videos to ensure compliance with professional and institutional standards.
7. Inform parents of children and youth of social networking sites and platforms used within the ministry.
8. When possible, send communication (1) to entire groups, (2) to an individual s wall," or (3) in public areas, rather than in private messages. This includes photos, images, and videos.
9. When sending emails to a child or youth containing personal or private information about that child or youth, a copy should also be sent to the parents or guardians. Examples of these types of emails include: payment due information, specific medical requests or questions, etc. Mass emails sent to an entire group are not required to be copied to parents or guardians.
10. Disclose ongoing digital pastoral communications (i.e.: e-mails, Facebook messages, texting, etc.) with children and youth to a parent and/or a supervisor to determine when a referral to a professional provider or resource is needed.

Create covenants to govern digital groups, which include:

1. Appropriate and inappropriate behavior of members (bullying, pictures that depict abuse, violence, illegal activities, sexual acts, etc.) and the consequence for inappropriate behavior;
2. Who may join and/or view group activity, when participants should leave the group, and when/if the group will be disbanded;
3. Description of content that can be posted or published on the site or page;
4. A prohibition of tagging" photos and videos of children and youth. However, the captioning of photos and videos is permissible with written permission from a parent or guardian;

5. Notification that mandatory reporting laws will be followed; and
6. Consequences for breaking the covenant.
7. Delete inappropriate material posted in digital groups, address the behavior and report it, if necessary, following legal and institutional requirements.
8. In video calls, follow the same criteria used in telephone calls. In addition, prudent judgment regarding attire and surroundings should be observed.
9. Comply with the following best practices regarding   groups" on social networking sites:
    a. Have at least two unrelated adult administrators as well as at least two youth administrators for groups that are designed for youth;
    b. Use closed groups, but not hidden" or secret" groups, for youth;
    c. Have only youth administrators invite other youth to join the online group unless a youth previously asked an adult administrator to invite them to join;
    d. Remove any content that shows or describes inappropriate behavior outside the bounds of the established behavioral covenant;
    e. Open social networking groups for youth to parents of current members;
    f. Remove adult leaders of youth groups and youth who are no longer members, due to departure, removal from position, or are ineligible because they aged out" of a program from social networking sites, list serves, etc.;
    g. Observe mandated reporting laws regarding suspected abuse, neglect, and exploitation

Model Policy for the Protection of Children and Youth (2022)
Model Policy for the Protection of Vulnerable Adults (2022)

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