

# Whole and Healthy Church: Policies & Procedures for the Episcopal Diocese of Los Angeles

## Table of Contents

[Preface](#)

[Theological and Ethical Foundations](#)

[Definitions](#)

[Standards of Conduct](#)

Policies & Procedures:

- [Alcohol and Substance Abuse Policy](#)
- [Suggested Practices and Guidelines for Use of Social Networking and Other Forms of Digital Communication](#)
- [Policy for the Protection of Children and Youth](#)
- [Policies and Practices for the Protection of Vulnerable Adults](#)
- [Sexual Harassment Policy](#)
- [Title IV: Policy Regarding Clergy Misconduct](#)

[Responding to Concerns](#)

[Compliance with Whole and Healthy Church](#)

- [Training and Screening Requirements](#)

Sample Forms & Forms Used by the Diocese:

- [Congregational Whole and Healthy Church Self-Audit for Annual Review](#)
- [Confidential Notice of Concern](#)
- [Incident Report](#)
- [Field Trip Permission](#)
- [Medical Release Form for Minors](#)
- [Driving Permission for Minors](#)
- [Minor Image Release Form for Minors](#)
- [Volunteer Application](#)
- [Volunteer Driver Application](#)

## Preface

The Called to Right Relationship documents are a statement of expectations for clergy, lay employees, volunteers and all members of our congregations in their relationships with each other in church. Any discussion of ethics for the Church assumes the baptismal vocation of the whole community, which in turn assumes the holiness of human relations and their place in holy creation.

These guidelines are meant to encourage and inform all members of the diocese in their ministry-related activities involving the Episcopal Diocese of Los Angeles and its congregations, schools and other entities. Please note, however, that the documents do not pretend to be a comprehensive statement of expectations for all relationships involving lay and ordained Episcopalians. Questions of civil, criminal, and employment offenses should be addressed with the relevant authorities first, and then as questions of ministry misconduct, when applicable.

Each congregation or institution is required to maintain a complete and current copy of this policy in a place accessible to all people. In addition, this policy is on the diocesan website. Local entities may make additions in developing local policy so long as those additions do not conflict with the requirements of these policies.

No policy can foresee every possible circumstance to which it may be applied. Local leadership must understand these policies thoroughly enough to make appropriate judgments about local circumstances. If uncertain of their judgments, the local entity should contact the bishop's office for consultation.

This policy is intended solely for the internal use of the diocese in performing its functions as a religious body. It is not a contract, agreement, promise, or undertaking by the diocese to do or refrain from doing anything. It is not intended that the policy described in the statement be imposed as rigid law, binding the diocese or others; rather, the policy must be interpreted and applied compassionately in accordance with the theological and biblical principles of the Gospel. Any actions or decisions by the diocese in connection with the policy are to be undertaken at the diocese's sole discretion, in accordance with the theology and ecclesiology of the Episcopal Church, and in the exercise of the diocese's constitutional rights as a religious body. This document is not intended as a personnel policy or guide to employment decisions.

Ultimately, ecclesiastical leadership in each congregation is responsible for compliance with this policy within the congregation.

## Theological and Ethical Foundations

God expressed the fullness of humanity in Jesus of Nazareth, whom we worship as the Word made flesh. To be human is to live with God and the whole of creation in the fullness of freedom and the challenge of responsibility. The pattern of Jesus' life, death, and resurrection resonates unreservedly with God's call to perfect freedom and responsibility.

In baptism God, speaking through the Church, claims us in Christ. We become in Christ the community of God's final purpose: justice and peace, love and plenty for the whole creation. This new community lives in Eucharistic fellowship with God and Creation, as a sign and instrument of God's reconciling purpose in the world.

The Church is called to minister in and to the world, and such ministry is the vocation of the whole community. Laypersons, deacons, priests, and bishops together represent Christ and the Church in the world.

The obligation to seek and serve Christ in all persons and to respect the dignity of every human being is binding for all the baptized. The authority with which leaders — ordained persons and adults who minister with minors, vulnerable adults, and people of all ages — are entrusted creates an inherent power imbalance in the pastoral relationship. This power imbalance derives from the leadership role and, in the case of clergy, the symbolic authority of an ordained person. Christian leadership is intended to provide occasions for guidance and grace, and its abuse is always and unequivocally wrong.

Ministry involves a necessary tension between a Gospel-based integrity and a Gospel-based intimacy as modeled by the life of Christ. A rigid adherence to a system of rules leads to an unproductive legalism. Yet, without the framework of the law, the intimate relationships into which Christ calls us risk distortion and harm. All the people of God are called to minister attentively within this tension. These policies are intended to provide a pattern for attentive practice of ministry.

This document is a statement for the Episcopal Church in the Episcopal Diocese of Los Angeles, setting forth expectations for its leaders in their pastoral relationships with all people. The purpose of these model policies is to foster the highest standards of behavior in ministry settings and across our faith communities, ensuring integrity, respect, and care.

As noted in the Preface, no policy can foresee every possible circumstance to which it may be applied. Questions of civil, criminal, and/or ecclesiastical discipline and employment offenses should be addressed to the office of the bishop immediately. Church governing bodies and all leaders

should understand these policies and all local requirements thoroughly enough to make appropriate judgments and should consult with diocesan chancellors when unanticipated situations arise.

Local modifications and additions to these policies are appropriate, provided that they meet or exceed the standards contained herein. Please consult with the chancellors in developing locally appropriate adaptations.

## Definitions

*NOTE: These definitions reflect our current understanding of terms describing gender identity and sexuality, which are ever-evolving.*

**Abandonment:** Desertion of a frail or vulnerable elder by anyone with a duty of care for an older adult

**Accord:** A written resolution that is negotiated and agreed among the parties, resulting from an agreement for discipline or conciliation.

**Adult:** Anyone who is 18 years or older and not in high school.

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

**Advisor:** A person designated to support, assist, and consult with a Complainant or Respondent in any matter of discipline under Title IV.

**Advocate:** A friend, family member, support person, or other advocate (including a diocesan-assigned advocate), of complainant's choice, who accompanies the Complainant in meetings with diocese personnel.

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

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

**Child:** Anyone under the age of 12 years.

**Child Protective Services:** A social services program provided by state and local governments serving children and their families who are in need of assistance. Child Protective Services receives and investigates reports of suspected abuse, neglect, and exploitation.

**Church Attorney:** One or more attorneys selected pursuant to diocesan canons to represent the Church in proceedings as under Title IV.

**Cisgender:** An adjective describing a person whose sense of personal identity and gender expression corresponds with their sex assigned at birth.

**Complainant:** (a) Any person or persons from whom the Intake Officer receives information concerning an alleged Offense and who consents to be so designated by the Intake Officer, or (b) Any Injured Person designated by the bishop diocesan who, in the bishop diocesan's discretion, should be afforded the status of a Complainant, provided, however, that any Injured Person so designated may decline this designation.

**Conference Panel:** A panel of the Disciplinary Board to serve as the body before which an informal conference is held.

**Confidential Notice of Concern:** A form filled out and submitted to either the congregation's rector, vicar, priest in charge, or senior warden or to the office of the bishop that outlines an incident in violation of these policies.

**Coordinator:** A person, appointed by the bishop, who shall be responsible for coordinating the diocesan response to allegations of clergy sexual misconduct and for assisting the bishop with regard to any proceeding hereunder in any other manner the bishop may see fit.

**Covenant:** A written agreement between a congregation and its staff, its volunteers, or the members of a particular ministry concerning behavior either online, in person, or pertaining to a specific situation.

**Diocese:** The Episcopal Diocese of Los Angeles.

**Disciplinary Board:** The body that oversees the Title IV process concerning clergy.

**Domestic Abuse:** A pattern of physically, sexually and/or emotionally abusive behaviors used by one individual to maintain power over or to control another in the context of an intimate or family relationship.

**Emotional Abuse:** Verbal attacks, threats, rejection, isolation, or belittling acts that cause or could cause mental anguish, pain, or distress to another person including children, youth, and older adults.

**Exploitation:** Theft, fraud, misuse of authority, neglect, or use of undue influence as a way to gain control over a person's money or property.

**Gender Non-binary:** An umbrella term for people who identify their gender as neither male nor female. These people might identify as both genders (“bigender”), neither gender (“agender”), or a mix between the two genders (“genderfluid”), or they can be unsure of their gender (“genderqueer”).

**Hearing Panel:** A panel of both clergy and lay members of the Disciplinary Board who serve as the body before which a hearing is held.

**Intake Officer:** The person(s) designated by each diocese to receive information regarding an offense by a member of the clergy. Anyone may contact an intake officer to report concerns.

**Lay Leader:** An elected or appointed lay person (whether paid or volunteer) with leadership responsibilities in a church or diocesan organization, when that person is engaged in church or diocesan activities.

**Leader:** A person who, for the benefit of another, engages in ministry but who is not responsible for overseeing other adults engaged in that same ministry. Examples include: church school teachers, Eucharistic Visitors, and members of pastoral care teams.

**Live Scan:** The process of capturing fingerprints digitally using a scanner. These fingerprints are then submitted electronically to state or federal agencies, such as the California Department of Justice (DOJ) or the FBI, for processing.

**LGBTQ+:** An acronym for Lesbian, Gay, Bisexual, Trans, Queer/Questioning, and others. It refers to people whose gender identities vary from their 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 sexuality expands and matures.

**Mandated Reporter:** A person who is required by state law to report reasonable suspicions of abuse, neglect, or exploitation of vulnerable populations to the appropriate state agency. State laws vary greatly. Generally, state law mandates that either all adults or adults in certain professions report suspected abuse of children, elders, and dependent adults. It is imperative to know the requirements of applicable state laws for the diocese in which ministry occurs. Typically, individuals who are not mandated to report suspicion of abuse may make a report to the appropriate state agency, even when not legally required to do so.

*In California all Clergy and those who are paid to work with minors are mandated reporters.*

**Neglect:** A caregiver’s failure or refusal to provide for a child, youth, or vulnerable elder’s safety, physical needs, or emotional needs.

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

**Order:** a written decision of a Conference Panel or a Hearing Panel.

**Organizations:** The diocese and all institutions for which it has legal or fiduciary responsibility. Those institutions include the cathedral church and all departments, commissions, institutions, charter organizations, religious orders, schools, ecumenical associations and other organizations listed on the Episcopal Diocese of Los Angeles website at [www.diocesela.org](http://www.diocesela.org).

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

**Pastoral Ministry Agreement:** An agreement (preferably written) between a community and its parishioner, volunteer, staff member, or lay leader who has a felony or misdemeanor conviction on their background check or who has exhibited problematic behavior. The Pastoral Ministry Agreement may specify accountability partnerships, limitations on the person's participation in the life of the parish, or other specific restrictions. The agreement also may include a plan for the person's recovery.

**Pastoral Relationship:** Any relationship 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 the Member of the Clergy has received information within the Rite of Reconciliation of a Penitent. It also includes any relationship between a lay minister and any person to whom the lay minister is offering prayer or other ministry or from whom the lay minister has received personal or confidential information in the course of offering ministry.

**Pastoral Support Team:** A team appointed by the bishop, in consultation with the diocesan coordinator, trained for sensitivity to the issue of clergy sexual misconduct.

**Physical Abuse:** Use of force to threaten or physically injure another person, including children, youth, vulnerable elders, and adults.

**Programs:** Official activities and Programs sponsored by the Episcopal Church and its provinces, dioceses, and churches. Examples include the Episcopal Youth Event, provincial youth events, pilgrimages, mission experiences, camp programs, etc.

**Public Record Check:** A search of documents and data available to the public including criminal and civil court records, credit reports, and driving records. Typically, such searches are conducted by a third party with expertise in this area. Also called a Background Check.

**Reference Panel:** A panel composed of the Intake Officer, the bishop diocesan, and the president of the Disciplinary Board, whose purpose is to refer an alleged offense (as necessary) to the appropriate body for further investigation and resolution.

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

**Respondent:** any Member of the Clergy

- (a) who is the subject of a matter referred for conciliation or referred to the Conference Panel or the Hearing Panel;
- (b) whose ministry has been restricted;
- (c) who has been placed on Administrative Leave;
- (d) who is the subject of an investigation;
- (e) who in the course of an investigation is asked by an investigator or the bishop diocesan to provide information or to make a statement; or
- (f) who agreed with the bishop diocesan regarding terms of discipline.

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

**Sacramental Use:** Use of consecrated or unconsecrated wine in the setting of the Eucharist.

**Sentence:** The pronouncement of discipline of a Member of the Clergy pursuant to an Accord or Order. Discipline may be in the form of

- (a) admonition, in which the conduct of the such Member of the Clergy is publicly and formally censured or reprimanded, or
- (b) suspension, in which such Member of the Clergy is required to refrain temporarily from the exercise of the gifts of ministry conferred by ordination, or
- (c) deposition, in which such Member of the Clergy is deprived permanently of the right to exercise the gifts and spiritual authority of God's word and sacraments conferred by ordination.

**Sexual Abuse:** Sexual contact that is forced, threatened, or otherwise coerced upon a vulnerable elder, anyone who is unable to grant consent to have sex, a minor, or an adult.

**Sexual Exploitation:** A betrayal of trust in a pastoral relationship by the development, or the attempted development, of a sexual or romantic relationship between the cleric or other church

worker or Leader and a person with whom they have a pastoral or fiduciary relationship, whether or not there is apparent consent from the individual.

**Sexual Harassment:** Unwelcome or unwanted sexually oriented humor or language, questions or comments about sexual behavior or preference, physical contact, inappropriate comments about clothing or physical appearance, or repeated requests for social engagements.

**Supervisor:** A person who has oversight responsibilities for or who leads a ministry program.

**Title IV:** The canons (laws) 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 their sex assigned at birth. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

**Training:** Organized activity aimed at imparting information or instruction to improve the recipient's understanding and performance.

**Vulnerable Adult:** This term includes:

- a person designated by applicable state law as an elder;
- any adult who is infirm or diminished in capacity due to age;
- any adult who is ministered to in their home (by Lay Eucharistic Visitors, Pastoral Care Visitors, Stephen Ministers, or others);
- any adult who is wholly or partially dependent upon one or more other persons for care or support, either emotional or physical. That dependency may be temporary, as in the case of an accident, illness, or birth of a child, or permanent; and
- any adult who, by virtue of a crisis, experiences vulnerability (as in the wake of job loss or the death of a family member) or lacks agency in a pastoral relationship.

**Youth:** Anyone who is at least 12 years old, but not yet 18 years old. A youth may also be an individual who is 18 years old or older and still in high school.

# Standards of Conduct

## The Ministry

Q. Who are the ministers of the Church?

A. The ministers of the Church are lay persons, bishops, priests, and deacons.

Q. What is the ministry of the laity?

A. The ministry of lay persons is to represent Christ and his Church; to bear witness to him wherever they may be; and, according to the gifts given them, to carry on Christ's work of reconciliation in the world; and to take their place in the life, worship, and governance of the Church.

Q. What is the ministry of a bishop?

A. The ministry of a bishop is to represent Christ and his Church, particularly as apostle, chief priest, and pastor of a diocese; to guard the faith, unity, and discipline of the whole Church; to proclaim the Word of God; to act in Christ's name for the reconciliation of the world and the building up of the Church; and to ordain others to continue Christ's ministry.

Q. What is the ministry of a priest or presbyter?

A. The ministry of a priest is to represent Christ and his Church, particularly as pastor to the people; to share with the bishop in the overseeing of the Church; to proclaim the Gospel; to administer the sacraments; and to bless and declare pardon in the name of God.

Q. What is the ministry of a deacon?

A. The ministry of a deacon is to represent Christ and his Church, particularly as a servant of those in need; and to assist bishops and priests in the proclamation of the Gospel and the administration of the sacraments.

Q. What is the duty of all Christians?

A. The duty of all Christians is to follow Christ; to come together week by week for corporate worship; and to work, pray, and give for the spread of the kingdom of God.

— An Outline of the Faith, BCP pages 855-856

The relationship of cleric and parishioner can be powerful in the lives of both and can be integral to a parishioner's faith journey. A parishioner puts their trust in a cleric. In this relationship of trust, the cleric has a professional and moral responsibility to put the interest of the parishioner above their own needs. This relationship can become complex, and in some cases seriously impaired. It is the cleric's responsibility to maintain the integrity of this relationship. These issues are further discussed elsewhere in this policy.

Lay people may be engaged in ministry by serving as elected parish leaders, by serving in leadership roles in worship (Eucharistic minister, lector, etc.), or by serving in other ministries offered through the Church. All lay ministers are expected to respect the dignity of others. Many of the guidelines offered below for ordained ministry apply to lay ministry as well. For example, lay ministers are expected to maintain appropriate confidentiality, boundaries, and self-care. Lay leaders have a responsibility to hold themselves to the highest standards of conduct when serving the people of God as leaders in congregations and in the diocese.

The diocese offers the following standards of conduct to assist and support all members of the diocese in maintaining the integrity of relationships in which they experience and offer ministry. It is expected that all ordained clergy and lay leaders in the diocese will be familiar with and will seek to follow these guidelines. These guidelines do not include all diocesan policies or contingencies. An attempt has been made to refer to additional diocesan policies where appropriate.

Clergy and lay leaders are welcome to contact the office of the bishop as they seek to follow these guidelines, particularly if they are encountering struggles in doing so.

**Lay leaders and Clergy in the Episcopal Diocese of Los Angeles are expected to:**

- **Be screened, trained, and background checked.**
- **Treat themselves with dignity and respect by taking good care of themselves.**

This includes, but is not limited to, the following:

  - Self-care: Regular and consistent incorporation of wellness and self-care practices in their life.
  - Accountability: Lay leaders and clergy are strongly encouraged to have groups and individuals to whom they are accountable, and with whom they confer as a matter of ordinary course (e.g., colleague support groups, spiritual directors, therapists). For new clergy and for clergy in transition to new calls, the diocese offers Fresh Start groups. Diocesan staff is available for consultation on how to form other cohorts.
  - Boundaries: Setting boundaries is setting appropriate limits with parishioners and each other as to when they are available, what is appropriate mutual conduct, and the like. If someone violates boundaries by going beyond what is appropriate in the relationship (e.g., seeking to romanticize the relationship, demanding inordinate amounts of attention, seeking to meet alone, sending too many and/or inappropriate email or text messages, or doing anything else that makes the other person feel uncomfortable or unsafe), firmly and clearly communicate what behavior is acceptable and what is not.

Some people do not change their behavior in spite of all efforts to explain why change is needed. In such cases, lay people and clergy are welcome to seek consultation by contacting the bishop or a member of the bishop's staff.

- Conflict-resolution: Defined as addressing in healthy ways the conflicts that may arise between an ordained minister and a parishioner, or among a group of parishioners or lay leaders.

▪ **Comply with diocesan Whole & Healthy Church policies.**

These policies set forth behavioral standards for all adults engaged in ministry throughout the diocese. The policies also set standards for screening and selecting staff and volunteers, with specific guidelines for those who work with children and youth, elders, and vulnerable adults. In addition, the policies set out in detail the behavioral standards for youth and adults participating in diocesan-sponsored youth events.

Ultimately, ecclesiastical leadership in each congregation is responsible for compliance with these policies within the congregation.

While behavior standards are outlined in the policies, the diocese cannot emphasize strongly enough that, as a general matter, it requires its lay and ordained ministers to adhere to a high standard of conduct. The specific behavior standards applicable to all adults, ordained and lay, for ministry with children, youth, elderly, and adults are as follows:

Neither ordained nor lay ministers shall:

- Provide minors with illegal drugs, legal drugs with the intent of misuse, pornography, or non-sacramental alcohol;
- Provide adults with illegal drugs, legal drugs with the intent of misuse, or pornography
- Consume illegal drugs, or misuse legal drugs at any parish event;
- Consume non-sacramental alcohol at any parish or diocesan event where acting as the responsible party;
- Be under the influence of alcohol, illegal drugs, or misused legal drugs at any parish or diocesan event;
- Engage in illegal behavior or permit others (adults, children, or youth) to engage in illegal behavior;
- Engage in any sexual, romantic, illicit, or secretive relationships or conduct with any child or youth or person whom the minister is ministering to or leading; or
- Discuss their own sexual activities or fantasies with children or youth or adults.

Ordained and Lay Ministers shall:

- Focus on ministry that maximizes a vulnerable adult’s independence and choice to the extent possible based on the adult’s capacity.
- Do no harm. Inadequate or inappropriate ministry may be worse than no ministry.

In the state of California, clergy, faculty/staff in schools, and lay leaders are mandated reporters for abuse of children, youth, elders, and dependent adults. Mandated reporting is discussed elsewhere in these policies.

- **Avoid dual relationships and be aware of their consequences.**

Dual relationships in a church setting occur when clergy, staff, or lay leaders attempt to relate to a person on two levels at the same time. This can happen when a leader attempts to relate to an individual both personally and professionally (i.e., as cleric and parishioner, and at the same time in some other role such as employment supervisor). Dual relationships diminish the effectiveness of ministry.

To avoid dual relationships:

- Discourage hiring parishioners to serve in paid staff positions. If such an arrangement is unavoidable, the clerics and lay leaders should understand the risk to all relationships involved and take steps to mitigate that risk. Any employment decision concerning the parishioner must be ratified by the vestry or bishop’s committee, there must be clear guidelines for separation spelled out in the letter of agreement, and alternate arrangements must be made for pastoral support of the employee.
- Discourage a clergy spouse, partner, or family member to serve on parish staff as a lay employee, or as a parish officer or vestry member in the congregation where the related clergy person serves.
- Avoid intimate personal relationships with parishioners and others to whom you minister.
- Do not sexualize any relationship with parishioners or others to whom you minister.
- Cultivate good habits of mind. It is necessary to cultivate certain habits of mind that help prevent the misuse or abuse of clerical privilege and authority.
  - These habits include the following practices.
    - Self-questioning: Am I conscious of my role as an ordained person or parish leader in this situation?
    - Recognizing danger signals, including:
      - rationalizations, such as finding excuses for pushing back the usual boundaries;
      - the need to be needed—getting a personal thrill from pastoral functions;
      - failure to attend to any obsessive attachment to a pattern of fantasy (sexual, financial, self-aggrandizing, etc.).

- Being conscious of possible problem situations in which your own history may create particular vulnerability.
  - Remembering the need for limits, and thinking about finding a stopping place.
  - Aiming for the perspective that, while both the leader and the protected person are engaged in the “good work” of responsible Christian living, the leader is always the primary one required to maintain boundaries.
- **Accept only token gifts from parishioners and others to whom you minister and do not offer gifts beyond small tokens.**
- **Decline to accept loans of any kind from parishioners and others to whom you minister and do not offer loans of any kind;**
- **Decline to agree to be named as a beneficiary** or to act as an administrator or executor in a parishioner’s will or that of anyone to whom you minister and do not ask a cleric or lay leader to be named as a beneficiary or to act as an administrator or executor in their will;
- **Maintain confidentiality of information shared in the pastoral relationship.**  
In plain language, this means that clergy and lay leaders will not tell other people personal information a parishioner shares, unless that parishioner gives permission. Our goal is to uphold the principle of pastoral confidentiality, which exists to serve the process of healing and reconciliation, and, in the case of sacramental confession, of repentance and amendment of life.

At the same time, when there is grave danger of harm to the person being offered pastoral care or to another person, the person providing pastoral care may properly exercise discretion in violating such confidentiality.

We wish to alert clergy in particular to the need to seek wise counsel to help them deal with the competing moral claims, the potential conflicts between ordination vows and the laws of the state, and possible legal ambiguities that arise when they become aware of the possibility of physical or sexual abuse of minors, or where there is grave danger of harm to the protected person or to another person. Within this context and in relation to sacramental confession, we cite the Book of Common Prayer, which mandates that confidentiality is “morally absolute for the confessor and must under no circumstances be broken” (p. 446). This mandate is supported by the Clergy–Penitent Privilege in California Evidence Code Section 1032, which defines a penitential communication as “a communication made in confidence, in the presence of no third person so far as the penitent is aware, to a member of the clergy who, in

the course of the discipline or practice of the clergy member's church, denomination, or organization, is authorized or accustomed to hear such communications and, under the discipline or tenets of his or her church, denomination, or organization, has a duty to keep those communications secret.”

In general, California Evidence Code Sections 1033 and 1034 give both the person who makes a sacramental confession and the confessor the legal right to keep it secret. However, when there is grave danger of harm to the protected person or to another person, the cleric involved may properly exercise discretion in violating such confidentiality.

When clergy learn of abuse in the sacramental Rite of Reconciliation, where the obligation to confidentiality is morally absolute, they may be well-advised to consider urging self-disclosure as part of the counsel that precedes absolution, and under certain circumstances even withholding absolution until such self-disclosure is accomplished as a sign of penance and radical amendment of life.

Clergy are urged to seek wise and informed counsel to help them work faithfully, legally, and with integrity in this important and difficult area.

- **Comply with legally mandated reporting requirements** regarding the suspected abuse and neglect of children and youth, the elderly, and vulnerable adults. In California, clergy, school faculty/staff, and other church leaders are legally mandated reporters of suspected abuse and neglect of children and of elders and dependent adults. This is not a choice, but a legally enforceable responsibility. The diocese requires its clergy to be familiar with state law, as follows. Questions or need for clarification should be directed to the bishop's office.

The legal obligation of mandated reporting requires clergy to disclose information to the appropriate state agency in specific situations, except when the cleric learns the information within the bounds of the sacrament of confession.

Sections 11165.7, 11166, and 11166.05 of the California Penal Code provide:

- That members of the clergy are mandated reporters (“clergy member” means a priest, minister, rabbi, religious practitioner, or similar functionary of a church, temple, or recognized religious denomination or organization”);
- That knowledge or reasonable suspicion of child abuse or neglect acquired during a penitential communication is exempt from the mandate to report;
- That “penitential communication” is defined as a “communication, intended to be in confidence, including, but not limited to, a sacramental confession, made to a clergy member who in the course of the discipline or practice of his or her church,

denomination, or organization is authorized or accustomed to hear those communications, and under the discipline, tenets, customs or practices of his or her church, denomination, or organization, has a duty to keep those communications secret”;

- That “nothing in this subdivision shall be construed to modify or limit a clergy member’s duty to report known or suspected child abuse when he or she is acting in some other capacity that would otherwise make the clergy member a mandated reporter”; and

- **Refer instances of mental health issues and substance abuse issues to licensed, insured, and certified health care providers.**

The line between pastoral care and more specialized care can sometimes be blurry. Clergy and lay leaders are advised to develop their own list of referrals for mental health and substance abuse or domestic abuse problems and to rely on these experts for support and referral. Clergy and lay leaders who are licensed or certified are not to treat anyone who is a member or attends a parish in which they are serving.

In general, clergy and lay leaders should refrain from meeting with parishioners more than three times before referring them for specialized care. The exceptions to this guideline are spiritual direction, premarital counseling, and general pastoral care, which clergy and lay leaders offer routinely both formally and informally in the course of their ministry. Please consult with a member of the bishop’s staff if you need clarity in making decisions to refer.

- **Comply with the responsibilities of being an employer.**

Clerics and lay leaders in charge of paid staff, wardens, members of personnel committees, and similar positions are expected to conduct personnel matters in fair, impartial, and compassionate ways. This includes making decisions regarding hiring, supervision, record keeping, and termination, either for cause or due to financial restrictions. It also includes responding to allegations of misconduct by employees in a timely and appropriate manner. Keep in mind that personnel decisions should be kept confidential except in certain limited circumstances, such as when a government agency needs the information.

- **Comply with financial practices as set forth by the Episcopal Diocese of Los Angeles and The Episcopal Church.**

This includes conducting an annual audit of all accounts, including clergy discretionary and special ministry funds, and ensure that the financial systems within the congregation, such as use of money counters and designation of persons authorized to sign checks, are in accordance with the internal practices recommended by the diocese and The Episcopal Church.

Discretionary funds: discretionary funds are never to be used for personal gain or benefit; diocesan and parish guidelines must be strictly followed.

- o Any money given to a cleric must be either reported as income (as prescribed by the IRS) or deposited in a discretionary fund. (If the congregation or other organization has a rule against gifts, clergy must comply with that rule.)

No cleric or lay leader should use their influence with members of the church for personal financial gain or engage in any enterprise that would provide leaders benefit from their connection with the church (e.g., selling the parish list).

- **Bring resolution to relationships with parishioners and clerics when ministry at a parish ends.**

When clergy, lay staff, and lay leaders leave a parish, they should bring resolution to relationships with all parishioners in a manner that is healthy for the parishioners and for the congregation.

Clergy should follow the guidance outlined in the Episcopal Diocese of Los Angeles *Leaving Well Policy of Understanding* in all departures.

- **Foster collegiality and accountability by participating in diocesan leadership opportunities and encourage the people with whom you minister to do likewise.**

It is a diocesan expectation that clergy attend diocesan convention and other regular diocesan events such as Clergy Retreats/Conferences. New clergy and clergy in transition are required to attend *Anima - Ministry's Soul* provided by the diocese. Participation in ordinations and celebrations of new ministry is encouraged.

- **Sign an agreement that they have read this document and will comply with the policies laid out in it.**

Within 3 months of ordination, new call, or hire date within the Episcopal Diocese of Los Angeles, all clergy and paid staff must sign an agreement stating that they have received and read a copy of these policies.

## **Alcohol and Substance Use Policy for the Episcopal Diocese of Los Angeles (Adapted from General Convention Resolution 2015-A158)**

The 78th General Convention acknowledged The Episcopal Church's long-standing tolerance for the use of alcohol which, in some cases, has contributed to its misuse, and has undermined a climate of wholeness and holiness for all. Our Church culture too often avoids hard conversations about alcohol use and about the role of forgiveness and compassion in healing and recovery. We aspire to be a place in which conversations about alcohol, substance misuse, or addiction are not simply about treatment but about renewal, justice, wholeness, and healing. We affirm that Recovery Ministries of The Episcopal Church [www.episcopalrecovery.org](http://www.episcopalrecovery.org) has long been and continues to be a valuable resource for this work.

Following the directions of the 78th General Convention of The Episcopal Church, the Episcopal Diocese of Los Angeles — has adopted the following policy on alcohol and other substance misuse. Congregations are encouraged to update their policies on the use and potential for misuse of alcohol and other substances. These policies should consider and include the following:

- The Church must provide a safe and welcoming environment for all people, including people in recovery.
- Given the effects of alcohol as a mood-altering drug, alcoholic beverages shall not be served when the business of the Church is being conducted.
- All applicable federal, state, and local laws must be obeyed, including those governing the serving of alcoholic beverages to minors. In California this also includes evaluating whether a temporary liquor license is necessary to serve alcoholic beverages. Information and applications can be found at <http://www.abc.ca.gov>.
- Some dioceses and congregations may decide not to serve alcohol at church-sponsored events or gatherings. Others may decide to permit a limited use of alcoholic beverages at those events, in which case an equally attractive non-alcoholic alternative must also be offered.
- When alcohol is served, leaders must monitor the situation, and persons showing signs of intoxication must not be served. The rector, vicar, priest-in-charge, or appointed/hired leadership must appoint an adult to oversee its serving. That adult must not drink alcoholic beverages while in charge. If hard liquor is served, a California Responsible Beverage Service (RBS) certified server is expected, and such a certified person's presence is encouraged for beer and wine service.
- Alcohol should not be available or served to anyone at congregational events specifically for minors. Whether to have alcohol available at events for all people — including families and a broad age range — should be seriously considered, and a healthy relationship with alcohol

should be modeled. If minors are present, alcohol must be served at a separate station that is monitored at all times to prevent underage drinking.

- Alcoholic and non-alcoholic beverages must be clearly labeled as such. Food prepared with alcohol should also be labeled, particularly in uncooked items, because some people in recovery do not want to consume alcohol in any form..
- Whenever alcohol is served, appealing non-alcoholic alternatives must always be offered with equal prominence and accessibility.
- The serving of alcoholic beverages at church events should be publicized as an attraction of the event on a very limited basis. “Wine and cheese reception,” “cocktail party” are discouraged.
- Congregations may at times feel drawn to hold alcoholic-beverage tastings. Care should be given for those in recovery and the potential presence of minors before deciding to host such an event. Alternative events not revolving around alcohol must be considered.
- Ministries inside or outside of congregations will make certain that alcohol consumption is not the focus of the ministry and that drinking alcohol is not an exclusively normative activity.
- Food must be served when alcohol is present.
- The groups or organizations sponsoring the activity or event at which alcoholic beverages are served must have permission — in writing — from the clergy or the vestry. Such groups or organizations must also assume responsibility for those persons who might become intoxicated and must provide alternative transportation for anyone whose capacity to drive may be impaired. The clergy or vestry should consult with the parish’s liability insurance carriers.
- Any alcohol stored on church/school/camp/institution property should be in a locked cabinet, room, or closet. Key access should be limited and restricted to members of the clergy and church wardens. As with all congregational keys, this key holder must be current with safe church certification.
- Clergy shall consecrate an appropriate amount of wine when celebrating the Eucharist and perform ablutions in a way that does not foster or model misuse.
- We encourage clergy to acknowledge the efficacy of receiving the sacrament in one kind — and to teach on the historic doctrine of concomitance — and consider providing non-alcoholic wine.

## **Marijuana and Prescription Drugs**

The Episcopal Diocese of Los Angeles cannot condone or allow behavior that is in willful violation of federal, state, or local law (statutory, common, or otherwise) or of the rule, order, or similar requirement of any governmental authority or any court, administrative agency, or other regulatory authority. Although marijuana is legal in certain circumstances under California law, it still is illegal under federal law. As such, the use of marijuana, either medically or recreationally, and the

recreational and intentional misuse of prescription drugs is prohibited at diocesan or parish events, whether held on or off of diocesan or parish property.

## **Suggested Practices and Guidelines for Use of Social Networking and Other Forms of Digital Communication**

### **General Information about Social Networking & Digital Communication:**

This document is not a legal standard, but a suggestion for best practice in congregational and diocesan ministry.

Any communication sent digitally (email, social networking sites, notes or posts, etc.) is NOT CONFIDENTIAL because it may be shared or reposted to others. This is true even on apps that automatically delete posts after a certain amount of time.

Electronic interactions are just as “real life” as phone calls and in-person meetings. Social media provides an opportunity to bear witness to the wholeness of our beings. This means that in the way that our explicitly faith-based postings can share with the unchurched that we are people of faith, our non-faith-based postings can show the same people that we do things other than church. We need to think about our electronic interactions as always public and consider how we are portraying ourselves, developing relationships, and living our faith through them.

Electronic interactions and the suggested rules governing them are stricter if minors and those in relationships of pastoral care are involved, because those situations contain inherent power imbalances. (The same is true of in-person interactions.)

Laws regarding mandated reporting of suspected abuse/neglect/exploitation of children, youth, elders, and vulnerable adults apply in the virtual world as they do in the physical world. Those laws are considered above in the section of this document headed “Comply with legally mandated reporting requirements.”

### **Practices and Guidelines for Online Interactions**

Clergy and lay leaders are strongly encouraged to set stringent privacy settings on any social networking profile to shield both adult and youth members from viewing content that may be inappropriate.

Sites such as X, blogs, Snapchat, TikTok, and Instagram have two settings for privacy: public and private. Private requires approval for followers, but it is not the default setting. Adults in ministry should be aware of who their followers are and whether there are minors among their followers, and should monitor their postings accordingly. Use of the “private” setting will help in this monitoring.

Clergy and lay leaders should not submit “friend” or “follow” requests to parishioners or others to whom they minister. The disparity of power may undercut the other person’s ability to decline such requests. Clergy and lay leaders also cannot be the first to follow a parishioner’s account on a social media platform. The parishioner may not be able to decline such requests due to the disparity of power. The parishioner may ask to be “friends” or follow the leader’s account, and leaders should discern the level of contact they want to maintain before responding to these requests. Clergy and lay leaders also should consider the impact of declining a “friend” or “follow” request from parishioners, an act that may create tension in in-person relationships.

Clergy and lay leaders who want to connect with parishioners via a social networking sites are encouraged to set up a group account or public profile that all parishioners may join or follow. The purpose of having a personal profile as well as a parish group or public profile is to create a line of privacy and maintain healthy boundaries with parishioners as distinct from family, friends, and colleagues. Clergy and lay leaders can direct “friend” or “follow” requests from parishioners to the parish’s group page or their public profile.

If any adult chooses to accept friend or follow requests from minors or youth who are associated with their community of faith, that adult must give at least one other unrelated adult leader or responsible person full access to all aspects of the profile and correspondence that minors or youth can view. The overseeing person can provide advice on appropriateness and privacy settings.

Adults who want to connect via a social networking website with youth to whom they minister are strongly encouraged to set up a “closed” parish youth group within that site.

Any material on any site (whether affiliated with the church or not) that raises a reasonable suspicion that a child has been or will be abused, neglected, or exploited should be immediately reported to the clergy, the Diocesan Intake Officer, and California Child Protective Services, as well as the Diocesan Missioner for Christian Formation, Children, Youth. If the material is on a church-affiliated site, that material should be documented for church records and then removed from the site after consultation with the police or local child welfare authorities and notification to the diocese.

Material on a young person’s personal social media accounts is not the responsibility of the church or church leaders to monitor or critique. This should be made clear to parents/guardians. Should a young person post something inappropriate that a youth minister or adult connected with the church then views, that may be a pastoral issue best dealt with in off-line conversations.

### **Groups on social networking sites**

Online social networking groups can be created to maintain healthy boundaries while still connecting and communicating with specific ministry areas such as a parish youth group, confirmation group, pilgrimage or event group. Those groups should have at least two unrelated adult administrators as well as at least two youth administrators (if the group has youth members).

Invitations to youth to join the group should ideally be made by youth administrators, unless a youth previously asked an adult administrator to invite them to join the group. However, it is sometimes necessary for adult administrators to invite youth to ensure full and timely inclusion of youth group members.

Behavioral covenants should be created to govern what content is appropriate and inappropriate for an online group, particularly if it involves youth.

Covenants should acknowledge that materials posted on church sponsored sites (and/or group pages) are NOT CONFIDENTIAL and that content deemed inappropriate will be removed from the site or group page. Covenants should be created through consultation and conversation with group members, whether youth or adults.

Covenants for communities of faith should address the following issues:

- Appropriate language and content.
- How the covenant was reached, and who is signing on to it and that the covenant has been reached through a determining of group norms.
- Eligibility standards for members to join the social networking group. Things to consider include whether members must belong to a parish or youth group and whether there are age requirements/restrictions for participation for youth members.
- How membership can be lost or a person be removed from the social networking group. Consider how and when members will be removed from the group (for example, due to moving away, leaving the faith community, becoming too old for youth group, clergy leaving to minister to another parish, or for other reasons).
- Who, how, and when may photos be tagged (members identified by name; individuals may tag themselves in photos but should not tag others).
- Appropriate and inappropriate behavior of members (bullying, pictures that depict abuse, violence, sexual acts, etc.) and the consequence for inappropriate behavior.
- Compliance with mandated reporting laws regarding suspected abuse.

Inappropriate material posted online that does not raise suspicion that a child has been or will be abused, neglected, or exploited should immediately be removed from the site by an adult administrator. Any content that details inappropriate behavior (outside of the bounds of the

established behavioral covenant) during a church sponsored event or activity should be addressed immediately by adult youth leaders and parents/guardians.

Social networking groups for youth must be open to parents/guardians of current members.

Adult leaders of youth groups and former youth members who, due to departure, removal from position, or becoming ineligible because they “aged-out” of a program should immediately be removed from digital communication with youth groups via social networking sites, list serves, etc. It is good practice to have another group to which “graduated” youth can migrate so that they do not lose touch with their church community.

### **Recommendations for direct digital communication, texts, video chats, blogs, or video blogs**

Adults should refrain from initiating text conversations or video chats with youth unless there are at least two youth and one unrelated adult present on the chat along with the initiating adult. If a youth initiates a private text conversation or video chat with an adult, it is the responsibility of the adult to immediately bring in a second, unrelated adult.

Participants in a video chat or blog should consider what will be shown in the video such as their surroundings, their clothing/state of dress, etc.

All transcripts of on-line text chats, phone texts, video chats, blogs, or video blogs should be saved when possible. Messaging services such as iChat/Messages, What’s App, Trillian, Adium, and others integrate a variety of messaging options so that messages can be logged. It is the adult’s responsibility to ensure that chats are on the record.

Adults should not use messaging services that automatically delete messages, such as Snapchat and Confide, to communicate with youth. Clergy and lay leaders should not use these platforms to communicate with those they minister to.

All clergy and adults engaged in ministry should consider the content and nature of any post that will be read by or visible to youth and other adults in your parish. Your voice is often considered the voice of the church.

### **Recommendations for publishing/posting content online**

Congregations must inform participants when they are being recorded or photographed because church buildings are not considered public space. Recording a conversation without telling the other person you are doing so is a felony in California. Any faith community that distributes video of its worship services or activities on the web or via other broadcast media MUST post signs that indicate the service will be broadcast.

All communities of faith should take care to secure signed Image Release forms from adults and guardians of minor children who will or may participate in activities that may be photographed or videoed for distribution.

Photos that are published on church sponsored sites should not include name or contact information for minors

There are further considerations when using photos and videos of minors for ministry purposes. Respect the dignity of every person depicted in an image. Do not attach student names with their image (i.e.: captions, tagging on Facebook, X, or Instagram).

### **Recommendations for use of written social media or electronic communication**

Email and Social Media can be an appropriate and effective means of communicating basic factual information such as the time of an event, agenda for a meeting, text of a document, etc. However, they are not an appropriate communication method for matters that are pastorally or legally sensitive, emotionally charged, or in need of extensive conversation. Double check that stories are yours to tell or share before doing so, especially when breaking news about births, deaths, and other major life events.

Humor and sarcasm can be easily misinterpreted in an email.

All email users should take a moment to consider the ramifications of their message before clicking on the “send” or “reply to all” button.

Parents/guardians should provide consent via a release form before adults, clergy, or youth ministers text or email children or youth directly. It is preferable not to text or email individually whenever possible; best practice is to include at least one other adult or multiple youth in the text message or email. There are many great apps that allow for group texts and communication like GroupMe, Beluga, and WhatsApp.

All clergy and lay leaders should use good judgment when they communicate electronically. An example of good practice is to text or email, except in case of emergency, only during “normal” hours (9 a.m. to 9 p.m.).

## Policy for the Protection of Children and Youth

A Responsible Person shall monitor and supervise the behavior of adults, children, and youth to ensure appropriate behavior and healthy boundaries.

All people who minister to children and youth must have ongoing supervision. Ongoing supervision should consist of regular check-ins by the Responsible Person, who may be parish clergy, parish staff, or a team leader. Such supervision shall review the scope, accountability, and responsibility of the ministry with the person engaged in the ministry. Each person engaged in any ministry should know who supervises their ministry and how to contact the Supervisor at all times.

Dioceses, congregations, and organizations shall ensure that all people who minister to children and youth receive prior training as to the scope, accountability, and responsibility of the ministry. Dioceses, congregations, and organizations shall maintain an up-to-date list of persons with their contact information approved to minister to children and youth. This list shall be kept in the organization's office.

### **Behavioral Standards for Adults in Ministry with Children or Youth**

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 in the Standards of Conduct, 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 are encouraged to:

- Have ongoing spiritual practices, which might include: daily prayer, regular participation in corporate worship, and Bible study;
- Spend time with and listen to children and youth, and advocate for their ministry within the Body of Christ;
- Offer appropriate physical expressions of care, 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;
- Model appropriate affection with other adults; and
- Be accountable to the community for behavior.

Adults shall not under any circumstances:

- Provide children or youth with non-sacramental alcohol, marijuana, drugs (including over-the-counter medication), cigarettes, tobacco products, e-cigarettes, vapes, or pornography;
- 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 or youth at an event;
- 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 or youth at an event;
- Engage in illegal behavior or permit other adults, children or youth to engage in illegal behavior;
- Engage in any sexual, romantic, illicit, or secretive relationship or conduct with any child or youth;
- Apart from planned pre-approved educational programs, discuss their own sexual activities, fantasies, or their own use or abuse of drugs or alcohol with children or youth.

### **Unrelated Adults Required**

There shall be at least two unrelated adults (at least two years older than the eldest participant and having never been a member of the youth ministry at the same time as the current youth) 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 shall report those circumstances in writing to the Supervisor, clergy in charge, senior warden, and/or Responsible Person as soon as possible.

Only one adult may be sufficient in 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). These exceptional circumstances must be specifically described in a written document and approved by the governing body of the congregation.

### **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 or materials, unmonitored adult contact, or unsupervised peer contact.

For example:

- **Alcoholic beverages.** Alcohol (sacramental or otherwise) shall not be stored in publicly accessible areas of the church buildings. (See the Diocesan Alcohol and Substance Abuse Policy)
- **Computers and electronic devices.** Children and youth shall have adequate supervision when using electronic devices belonging to dioceses, congregations, and other organizations.

Devices shall have adequate password protection. Each user shall have their own account and password.

- **Keys and access to locked spaces.** Anyone with keys or electronic access to church buildings shall meet all the requirements for screening and training according to the Screening and Training Protocols.
- **Unused spaces.** Spaces not in use should not be readily accessible. Given the vast differences in facilities, each congregation and organization should determine how best to meet this standard.

### **Basic Needs**

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

Exceptions may be made for programs intended to teach children or youth about poverty, need, and hunger, such as an intentional fasting program. In these cases, children and youth must agree in writing to participate, and parents or guardians must give written permission that includes 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 who are unable to complete the program must have their basic needs met immediately.

### **Violence and Weapons**

- No one is to strike, hit, or otherwise physically threaten or harm anyone at any time.
- Bullying of any kind by anyone is prohibited.
- Children and youth shall 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 from the diocese or parish governing body.
- Report suspected violations immediately.

### **One-to-One Conversations with Children or Youth**

When one-to-one conversations occur between an adult and a child or youth, another unrelated adult is either to be present or capable of visually monitoring the conversation.

Examples include:

- 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.
- 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 shall be informed about the appointment or plans in advance.

Confidentiality cannot be guaranteed if a child or youth discloses a situation pertaining to abuse, neglect, self-harm, or exploitation, because of mandatory reporting laws. Children or youth might naturally ask for confidentiality when disclosing such a situation. The adult should tell the child or youth gently that they will keep the disclosure as confidential as possible, but that, to keep everyone safe, they might need to tell someone about it. If the child or youth then is reluctant to speak, the adult should try to persuade the child or youth to continue. Ultimately, the decision whether to disclose belongs to the child or youth.

Impulsive, secluded, or secretive activity, online or in person, with children or youth may foster a high-risk situation, and is therefore to be avoided. (Regarding online activity, see “Suggested Practices and Guidelines for Use of Social Networking and Other Forms of Digital Communication”)

### **Supervision**

- At any gathering of children or youth, there shall be at least two unrelated adults with one being age 25 or older, reflecting the sex and gender identity of the participants to the extent possible.
- Minimum ratios of adult to child/youth shall be in accordance with American Camp Association (ACA) guidelines as follows:
  - 5 years & younger — 1 adult for each 5 overnight-participants and 1 adult for each 6 day-participants
  - 6–8 years — 1:6 for overnight, and 1:8 for day
  - 9–14 years — 1:8 for overnight and 1:10 for day
  - 15–18 years — 1:10 for overnight and 1:12 for day
- Additional adults can provide skills, mentorship, support, encouragement, spiritual guidance, and joy.
- When you have new leaders-in-training, the leadership teams should also have a reasonable number of experienced adult leaders to provide support.
- Adults should not have been active members of the youth group at the same time as the current youth. Recently graduated young adults should work with younger groups until their youth group peers have also graduated.

### **Inclusiveness**

No one shall 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 assigned at birth, sexual orientation, gender identity, gender expression, differing abilities, or socio-economic class. To the extent possible, all spaces and settings for programs, activities, and ministry shall be accessible.

The Episcopal Diocese of Los Angeles seeks to support all children and youth by providing reasonable alternative arrangements, if possible even beyond the requirements of the law, to address safety and comfort.

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

Safe bathroom/shower facilities will be provided by gender (or specific times will be assigned to the use of a single facility). This includes making sure the facilities can be monitored by adults for the safety of the children and youth. Whenever possible, private bathroom accommodations are preferred.

Adults should either have separate shower facilities or shower at other times than the children and youth. Separate dressing facilities should also be provided.

### **Overnight Programs**

In overnight programming, particular attention will be given to historically excluded or less recognized people, such as LGBTQ+ and disabled individuals. In a situation of unequal power and safety, 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:

- The safe use of restrooms and showers by all participants requires the diocese, congregations, and other organizations to consider numerous factors, including, but not limited to: age, sex, gender identity, gender expression, and privacy. Adults should have separate showers or separate times for showers.
- Overnight programs shall provide safe, supervised sleeping arrangements.
  - No bed, cot, or sleeping bag shall have more than one person sleeping in it.
  - Supervision by two unrelated adults is required in any space where one or more children or youth are sleeping.

- o Adults supervising an overnight program cannot use medicated sleep aids (either prescription or over the counter). They need to be able to be alert and awake at any time of the night in case of an emergency.
- o It is acceptable for all participants to sleep in the same open area when dressing rooms and bathrooms provide appropriate privacy.
- Participants shall have access to three substantial meals each full day and access to sufficient water.
- Participants shall be given the opportunity for at least seven hours of sleep each 24-hour period, except for programs where parental/guardian permission is given to miss sleep. In these cases, children and youth must agree to participate in writing, and parents/guardians or guardians must give written permission that includes certification that the youth or child does not have a medical condition that would put the participant at risk by missing sleep.
- Participants shall have some time set aside each day for rest or free time.

Best practice guidelines for hotel stays:

- One child or youth per bed, including cots, pullouts or hide-a-beds, and rollaway beds;
- At least 2 children or 2 youth in each room.
- Adult supervisors or chaperones have rooms on the same floor, scattered among the rooms with children or youth, and at least one adult room is by the stairs or elevators;
- Adult leader assigns rooms and room occupants;

## **Transportation**

For the health and safety of all participants, the following practices shall be followed:

- For events that originate or terminate at the diocesan, congregation, or organization's facility, all drivers must be at least 25 years of age and provide proof of insurance, a current driver's license, and a completed volunteer driver information form. They must also have a satisfactory DMV records check.
- All drivers and riders must comply with state laws including seat belt and cell phone usage.
- Parents/guardians are responsible for the transportation and safety of their children or youth to and from the event or departure site. This responsibility includes the safe of any other passengers in their vehicle.
- Young people who are under 18 are expected to have written permission from their parent or guardian to drive to an event. They are also required to comply with California state laws concerning the number and identity of minors allowed in the car.

## **Special Considerations & Off-Site Programming**

Off-site programs, trips, and events are a welcome and often necessary means for spiritual, social, and emotional development. They also present additional challenges for maintaining best practices

for safe and healthy ministry. The expectations for safe space, as described above, should be observed off-site.

In the event of uncertainty about application of these policies, the Responsible Person should contact their Supervisor or the diocesan office with the relevant queries.

Because risks can't always be anticipated, it is important to obtain permissions and manage documentation as described below.

#### Prior Approvals

- Prior approval by the member of the clergy in charge (rector, vicar, etc.) or by other ecclesiastical leadership is required.
- Written parental approval is required before the viewing of any movie, whether off-site or on-site, rated "PG-13" or above, or participation in any conversation or program containing sexually explicit or violent content.
- These same prior approvals are required if the site is a private residence at which persons are hosting events such as cook outs, pool parties, progressive dinners, etc.

#### Registration, Waiver, and Release Forms

- All children, youth, and adults shall complete and sign a registration form and a waiver and release form before participating in any programs. Confidentiality must be preserved with respect to medical and other sensitive information in the forms. Such forms may encompass a program year.
  - There must be a parent/guardian's signature on all release and waiver forms for minors.
  - Completed registration, release and waiver forms shall be maintained in a secure location on-site.
- Permission slips shall be provided for each off-site event and shall be signed by the parent/guardian.
- Prior written permission for a minor to be photographed or recorded on film, videotape, audiotape, or other electronic media is required from a parent/guardian.

#### First Aid and Medications

- Current certification in First Aid, CPR, and Automated External Defibrillator (AED) use is strongly encouraged for those who work with children and youth.
- A first aid kit, appropriately stocked for the event and participants, shall be available in an easily accessible location.
- A record must be kept for all medication or first aid given to a participant. This record shall 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, and/or treatment given.

- All medications (prescription and over the counter) belonging to minors shall be given to the Responsible Person, unless otherwise agreed upon by the parents/guardians and the Responsible Person. Exceptions may include inhalers, epi-pens, and birth-control pills.
- Only the Responsible Person, or their adult designee, shall administer medications, and only with written permission of the parent/guardian.

### Insurance

All trips to off-site destinations must have adequate insurance. For more information, contact your insurance broker.

### **Out of Town or Overnight Travel**

Travel with children and youth presents 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. Along with opportunities for creativity and adventure, it also presents challenges to normal safety protocols. The following policies will help groups prepare for a variety of potential scenarios.

### Adult Leaders and Chaperones

- Regardless of group size, no group should travel with fewer than three unrelated adult chaperones who have passed background checks and received Whole & Healthy Church training.
- Adult chaperones may not drink or be under the influence of alcohol on children/youth trips.
- Minimum ratios of adult to minors need to be greater due to the possibility of leaving an adult behind with a participant in the event of a medical emergency.
  - 5 years and younger – 1:3
  - 6–8 years – 1:4
  - 9–14 years – 1:5
  - 15–18 years – 1:7
- One adult, minimum age 25, should serve as the travel administrator who is responsible for all administrative aspects of the trip, including carrying all necessary documentation, contacts, and forms, including:
  - medical releases;
  - community covenant;
  - emergency contacts;
  - itineraries; and
  - cash or credit card capacity to address emergencies.

- It is a best practice that one adult, minimum age 25, should hold a current medical certification to manage administration of necessary and permissible medications, administer immediate and necessary first aid, and triage medical situations to determine if care of an individual needs to be taken to a higher level. When this is not possible, one person should be designated to supervise the administration of medications as instructed on medical release forms, and a clinic near your destination should be identified ahead of time in order to respond to health emergencies as rapidly as possible.
- Acceptable medical certifications include:
  - ● Wilderness Medical Response
  - ● Outdoor Emergency Care
  - ● Emergency Medical Technician/Paramedic
  - ● Nurse — RN/LPN/Nurse Practitioner
  - ● Physician’s Assistant
  - ● Medical Doctor, Doctor of osteopathic medicine
- 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. These may be the same person.
- A copy of all documents should be left with an accountable person at the diocesan, congregation, or organization’s office. That person should also serve as the local emergency contact person for communications between the traveling group and families at home.

#### Insurance for Travel

- Short-term trip or supplemental insurance, available through most church and organization’s policies as an added rider, must be secured at least one month before travel.
- It is recommended that all travelers carry evidence of personal health insurance in the form of a copy of the actual card provided to the insured person.
- Because not all individuals have access to affordable and adequate health insurance, it is recommended that health insurance be added to trip insurance.

#### International Considerations

- Check in with the U.S. Department of State on travel requirements, including visas.

- Make certain that every traveler’s passport is valid for at least six months beyond your return date.
- Determine whether or not vaccinations are required and/or recommended for entry into specific countries.
- All those traveling with the group must adhere to U.S. law when abroad. Specifically, youth under 21 may not drink while on a church-sponsored trip, no matter what the local laws state.
- Arrange to have at least two cell phones with the group that will have active coverage at your destination(s). Make a back-up plan for communication with your Responsible Person at home.
- 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 here:  
<https://www.episcopalchurch.org/ministries/youth-ministries/mission-manual/>

### **Camps and Retreat Centers**

Episcopal summer camps and retreat centers provide an extended time for youth in the diocese to spend intentional time together. While they follow the model of a youth overnight event, the prolonged time together enables deep spiritual development and powerful emotional connection. To attend to the additional community needs that may arise as a result, there are additional guidelines to create a safe and supportive community. All camps in the Episcopal Diocese of Los Angeles will follow the guidelines for off-site programming established in this document. In addition, camps should aim to follow American Camp Association standards to the best of their ability.

Camp staff must be at least two years older than the oldest camper, must complete a successful background check, and must be provided a staff training to familiarize themselves with the camp or retreat center’s policies and facilities. The camp director will clearly explain the center’s Emergency Action Plan and provide adequate first aid training to staff members, preferably CPR/First Aid training, as well as abuse prevention training. There will be a chaplain available for spiritual support to campers and staff members, a camp director to coordinate staff members’ personal and professional needs, and a designated nurse or “first aid person” to dispense medication and respond to first aid needs.

### **On Site Schools, Day Cares, and space rentals involving children and youth**

If there are spaces in the congregation’s or organization’s building(s) that are used at any time by a school, day care, or outside group involving children and youth, those groups are subject to these guidelines, unless the regulations put upon them by the State of California or their licensing board

are more rigorous. Congregations or organizations are required to incorporate the EDLA policies and guidelines in any lease or licensing agreement with any non-diocesan youth based organization, and all agreements must be reviewed and approved by the Diocese's CFO and Standing Committee.

## Policies and Practices for the Protection of Vulnerable Adults

The Episcopal Diocese of Los Angeles takes seriously the welfare, respect, and care of elders and vulnerable adults. In addition to the pastoral care responsibilities for elders and vulnerable adults that all Christians are called to observe, our Baptismal Covenant calls us to strive for justice and peace among all people, and to respect the dignity of every human being. Because of this,

### **Checklist for prevention of abuse of vulnerable adults**

Any person — elders, family members, or professionals — who suspects that financial abuse of an elder has occurred should report it to appropriate authorities, such as Adult Protective Services or a law enforcement agency. Reports generally can be made confidentially, and, in most cases, the reporting person is protected from civil and criminal liability.

Family members, particularly those who find themselves in a caregiving role, should be aware of situations that place their older loved ones at risk for abuse. Family members should periodically inquire about their older family members' financial resources and the perceived limitations that may stem from their financial situation. They also need to keep an eye out for such things as:

- Unusual worry about finances or fear of an individual
- Unexplained trembling or crying
- Changes in communication patterns
- Any abrupt change in behavior
- Overpayment for goods and services
- Unusual cash withdrawals from a financial account in a short period of time
- Missing belongings from the home or room in a facility
- Excessive time spent on the Internet
- A signature that seems forged, unusual, or suspicious
- An unexplained reduction in bank accounts
- An increase in the number and amount of credit card charges
- An abrupt or unexplained change in the power of attorney, will, or other legal or financial documents
- Sudden transfer of assets to another person

Care must be taken to balance the duty to protect the safety of the vulnerable adult with the adult's right to self-determination. In addition, older people and people with disabilities who are victims of abuse, exploitation, or neglect should be treated with honesty, caring, and respect.

- Focus on ministry that maximizes the vulnerable adult's independence and choice to the extent possible based on the adult's capacity.
- Use family and informal support systems first as long as this is in the best interest of the adult.

- Maintain clear and appropriate professional boundaries.
- Volunteers in regular ministry with elders and dependent adults should complete diocesan-approved training for eucharistic visitors, which includes attention to pastoral and abuse prevention standards.
- Do no harm. Inadequate or inappropriate intervention may be worse than no intervention.

Stay connected with your older friends, neighbors, and relatives. Maintaining communication helps decrease isolation, a risk factor for mistreatment. It will also give elders a chance to talk about any problems that they may be experiencing.

Anyone who suspects an incident of elder abuse should contact their county Adult Protective Services office (see Responding to Concerns) or the local law enforcement agency.

In addition, suspected elder abuse or neglect among parishioners should be reported to the rector/vicar. Anyone who knows of a violation of these policies by a clergy person shall immediately report the violation to the bishop's office.

Clergy, ecclesiastical leadership, and staff hearing reports of violations of this policy shall be responsible for providing appropriate pastoral care to all those affected. Where appropriate, they also should take remedial or disciplinary action, including reporting to appropriate authorities or termination of employment or of volunteer ministry with the Church.

The bishop, hearing reports of violations by clergy, or by adults at diocesan events, shall be responsible for providing appropriate pastoral care to all those affected and appropriate remedial and/or disciplinary action, up to and including canonical disciplinary action.

All people who minister to vulnerable adults and/or have pastoral relationships with others must have ongoing supervision. Ongoing supervision should consist of regular check-ins by the Supervisor (who may be parish clergy, lay staff, or a team leader). Such supervision shall 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.

Dioceses, congregations, and organizations shall ensure that all people who minister to adults receive prior training as to the scope, accountability, and responsibility of the ministry.

Dioceses, congregations, and organizations shall maintain an up-to-date list of persons approved to minister to vulnerable adults and/or engage in pastoral relationships with other adults which includes

their contact information. This list shall be kept in the organization's office or other place where records are kept.

It is best practice for those ministering to vulnerable adults to document all their visits, including time, place, and any observations or concerns. Such documentation is reviewed by the Supervisor. Confidentiality among clergy and lay ministers is required and all documentation is kept confidential. This documentation promotes continuity of care and transparency in ministry.

All new activities that include pastoral relationships and/or ministry to vulnerable adults shall have a Responsible Person to monitor and supervise all events to ensure appropriate behavior and healthy boundaries.

### **Behavioral Standards for Ministry with Adults**

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

- Take care not to unduly influence a person to whom they minister;
- Accept only token gifts from those to whom they minister. Ministers given gifts shall report those gifts in writing to their Supervisor, clergy, senior warden, or Responsible Person;
- Decline to accept or give loans of any kind from those to whom they minister;
- Decline to agree to be named as a beneficiary or to act as an administrator or executor in a will of anyone to whom they minister; and
- Inform Supervisor, clergy, senior warden, or Responsible Person of anything that causes concern for the safety or wellbeing of those to whom they minister.

All who minister to vulnerable adults are encouraged to:

- Have ongoing spiritual practices, which might include daily prayer, regular participation in corporate worship, and Bible study;
- Spend time with and listen to vulnerable adults, and advocate for their ministry within the Body of Christ;
- 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;
- Maintain healthy boundaries when sharing personal information.

Ministers shall not under any circumstances:

- Provide vulnerable adults with non-sacramental alcohol, marijuana, illegal drugs, legal drugs with the intention of misuse, cigarettes, e-cigarettes, vapes, or pornography;
- Arrive under the influence of alcohol, illegal drugs, or misused legal drugs when they are responsible for, leading, or ministering to, a vulnerable adult;
- Consume non-sacramental alcohol or illegal drugs or misuse legal drugs when they are responsible for, leading, or ministering to a vulnerable adult;
- Engage in illegal behavior or permit others to engage in illegal behavior; or
- Engage in any sexual, romantic, illicit, or secretive relationship or conduct with any vulnerable adult (or any other adult they minister to).

### **Presence of Unrelated Adults**

It is best practice for those ministering to or leading adults to have another trained adult minister to whom they are not related or married present. Those engaged in such ministries should minister in pairs.

If circumstances result in a minister being alone with a vulnerable adult, that minister shall report this to the Supervisor, clergy, senior warden, or Responsible Person as soon as possible.

### **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 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:

- Be in places where casual monitoring by others is convenient; and
- Convey safety and comfort.

### **Visits to Private Residences**

The safety of all persons and healthy boundaries are essential when visiting a vulnerable adult in a private home. Avoid situations that might compromise privacy; common examples include:

- Visiting behind closed bedroom doors;
- Sitting on the bed of the person being visited; or
- Visiting a person while they are not fully clothed.

The best practice is to visit in teams of two or more unrelated adults. If it is not possible for another adult minister 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 shall be provided to the Supervisor as soon as possible after the visit.

### **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:

- Facility staff should be informed of the visitor's presence;
- If a visit takes place out of sight of facility staff, they should be notified in advance and informed when such meeting is concluded;
- The door to a resident's private room must remain open during visits;
- Visitors should be mindful that LGBTQ+ residents may not feel safe to express their sexual identity or orientation

In the event of uncertainty about application of this policy, the visitor is encouraged to contact their Supervisor with any questions.

### **Mandated Reporters**

Our elders are often the people who depend most on the Church and its leaders for guidance and protection. The Church is thus responsible for a high level of care, attention, and compassion in this area. Clergy are mandated reporters for elder abuse, whether that abuse is physical, emotional, or financial. In the State of California, mandated reporters (which include all ordained clergy) are expected to comply with the following:

“Any mandated reporter who, in his or her professional capacity, or within the scope of his or her employment, has observed or has knowledge of an incident that reasonably appears to be physical abuse, as defined in Section 15610.63 of the Welfare and Institutions Code, abandonment, abduction, isolation, financial abuse, or neglect, or is told by an elder or dependent adult that he or she has experienced behavior, including an act or omission, constituting physical abuse, as defined in Section 15610.63 of the Welfare and Institutions Code, abandonment, abduction, isolation, financial abuse, or neglect, or reasonably suspects that abuse, shall report the known or suspected instance of abuse by telephone immediately or as soon as practicably possible, and by written report sent within two working days....”

### **Violence**

- No one is to strike, hit, or otherwise physically threaten or harm anyone at any time.
- No one is to control or attempt to control another by bullying, intimidation, threats, verbal/emotional abuse, or isolation from others. Bullying of any kind is prohibited.
- All persons must report suspected violations immediately.

### **Inclusiveness**

No one shall 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 assigned at birth, sexual orientation, gender identity and expression, differing abilities,

socioeconomic class, or age. To the extent possible, all spaces and settings for programs, activities and ministry shall be physically accessible.

The Episcopal Church seeks to support all persons by providing reasonable alternative arrangements to address safety and comfort. Transgender, genderqueer, or gender non-binary adults who express the need or desire for increased privacy should be provided with reasonable alternative arrangements. Reasonable alternative arrangements may include the use of a private area, or a separate changing schedule, or use of a single-stall restroom. Any alternative arrangement should be provided in a way that protects the adult's ability to keep their transgender status confidential, if they so desire.

Transgender, genderqueer, or gender non-binary adults should not be required to use a locker room or restroom that conflicts with their gender identity. Safe bathroom/shower facilities will be provided by gender (or specific times will be assigned for the use of a single facility).

### **Transportation of Vulnerable Adults**

For the health and safety of all participants, the following practices shall be followed:

- For events that originate or terminate at the diocesan, congregation, or organization's facility, all drivers must be at least 25 years of age and provide proof of insurance, a current driver's license, and a completed volunteer driver information form, and also must have a satisfactory DMV records check;
- A list of those approved to provide transportation to vulnerable adults shall be maintained in the office of the organization;
- Anyone being transported must consent to that transportation beforehand. If a person is unable to consent due to impairment or lack of agency, then prior approval by that person's guardian, spouse, or other trusted family member is required;
- All drivers and riders must comply with state laws including seat belt and cell phone usage.

## Harassment Policy

*Adapted from CPG's model policies*

### Introduction

Laws protecting workers from sexual harassment or other harassment in the workplace apply to both employees and volunteers. In addition, General Convention Resolution A156 (2006) (see Appendix B) specifically states that all church workers, both paid and volunteer, must be protected by diocesan and congregational policies. Employees' and volunteers' rights under federal, state, and local laws may include: the right to file a complaint with a government regulatory body; the right to have a government regulatory body investigate the complaint and negotiate a remedy with the employer; the right to have the government sue the employer on the employee's behalf; and the right for the employee to sue the employer for such damages as back pay, reinstatement, lost future wages, and attorney's fees. The diocese supports all applicable laws, and issues this policy to help insure that all those who work for our churches can enjoy a workplace free of illegal harassment.

### Harassment Policy

The Episcopal Diocese of Los Angeles (the "Church") prohibits harassment of Church Personnel by anyone (including supervisors or decision-makers, co-workers, consultants, vendors, and other non-employees). Examples of harassment based on sex are given below, and sexual harassment is an area of law that has been highly developed. However, harassment based on any protected characteristic—including race, disability, age, national origin, or any other basis set forth in the diocese's discrimination policy—is prohibited. The behavior of individuals engaging in such conduct, or supervisors or decision-makers who knowingly allow such behavior to continue, will not be tolerated. All church personnel, whether supervisory or non-supervisory, and whether paid or volunteer, are prohibited from engaging in the conduct prohibited by this policy.

### Prohibited Behavior

As noted above, the Church prohibits all forms of sexual harassment in the Church and workplace. Specific definitions and examples of sexual harassment, which is harassment based on the recipient's sex, sexual orientation, gender identity, or gender expression, are set forth as examples below.

#### Sexual Harassment

Sexual harassment includes unwelcome sexual advances and requests for sexual favors. Other unwelcome conduct which may constitute sexual harassment includes, but is not limited to, the following:

#### Verbal:

- repeated sexual innuendos, sexual epithets, derogatory slurs, off-color jokes (for example, jokes that include sexual language, innuendo, references, scenarios, etc.);
- propositions, threats, or suggestive or insulting sounds (for example, comments about body, sexuality, etc., including insults and innuendo) even if the comment is about someone else;
- inappropriate e-mail (for example, e-mail that includes sexual jokes or other references of a sexual nature about any person, gossip or speculation about a person's sexuality, sexual practices, sexual health, pregnancy, virility, etc.). This includes e-mail that was sent accidentally, for example by hitting the "forward" button instead of "reply," or forgetting that a particular individual is on one of your group lists.

#### Visual/Non-Verbal:

- derogatory posters, cartoons or drawings (for example, cartoons and calendars that include nudity, sex acts, provocative poses, innuendo, sexual language, etc.);
- suggestive objects or pictures (for example, photographs that include nudity, sex acts, provocative poses; wallpaper, screensavers, or other electronic displays of a sexual nature);
- graphic commentaries; leering; or obscene gestures (for example, vulgar gestures, gestures simulating sexual acts, "shooting the finger," kissing the air toward someone or licking the lips in a sexually suggestive or provocative manner).

#### Physical:

- Unwanted physical contacts (including touching, interference with an individual's normal work movement, unwelcome displays of romantic or sexual affection, aggressive physical contact or assault); and

#### Other:

- Making or threatening reprisals to an individual who opposes, objects to or complains about sexual harassment; possession of inappropriate material of a sexual nature in the workplace or its display, duplication, or transmission.

#### Such verbal and physical conduct may constitute harassment when:

- Submission to that conduct is made either explicitly or implicitly a term or condition of an individual's employment or other Church work;
- Submission to or rejection of that conduct by an individual is used as a basis for employment or other Church work decisions affecting the individual;

- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment.

## **Retaliation**

The Church will not take any action in retaliation against any Church Personnel who, in good faith and with a genuine belief that he/she has been harassed based on any protected characteristic (sex, race, sexual orientation, etc.), brings or voices a complaint pursuant to this Policy or otherwise opposes harassment. In addition, the Church will not tolerate any retaliatory acts by other individuals.

Retaliation is a serious violation of Church policy and applicable law. If you believe you have been subjected to retaliation in violation of this Policy, you should report your complaint immediately in the manner specified in Section B below. Individuals will be subject to discipline, up to and including termination, if they are found to have retaliated against an individual because that individual (1) in good faith, and with a genuine belief that he/she has been subjected to harassment, made an honest complaint about such conduct, (2) participated honestly and in good faith in any investigation into a harassment complaint, or (3) in good faith opposed acts of harassment.

## **Procedures for Reporting Suspected Harassment or Retaliation**

If you believe that the actions or words of a supervisor/manager, co-worker, customer, vendor, volunteer, or other individual in the Church constitutes illegal or prohibited harassment based on any protected characteristic you have (sex, race, etc.), you have a responsibility to promptly report that behavior to the Church's management. Prompt reporting enables the Church to stop the harassment before it becomes severe and pervasive.

If you believe you have been the victim of any form of harassment or retaliation, you must promptly give notice of your complaint to one or more of the following:

- Your supervisor;
- Anyone in your supervisory chain;
- The rector or clergy person in charge of the congregation;
- A warden of the congregation;
- A diocesan intake officer (listed on the diocesan website [www.ladiocese.org](http://www.ladiocese.org) )
- The bishop

You are not required to complain to your supervisor or within your chain of command, particularly if your supervisor or someone in that chain is responsible for the harassment or retaliation you believe you have suffered. In addition to reporting the offending behavior to one of the people listed above, you are encouraged to speak directly to the individual whose conduct you find objectionable. If you decide to speak directly to the person involved, you may find that clear communication can sometimes resolve an issue immediately, as well as build greater understanding between you. You are not required to do this, however, and should do it only if you are comfortable doing so.

You may formally or informally complain to any of the above personnel via any of the following:

- Telephone call
- Letter
- E-mail
- Fax
- In-person meeting
- Filing a “Notice of Concern” or
- Online (there is a link on the diocesan website [www.ladiocese.org](http://www.ladiocese.org))

All supervisors and decision-makers are required to report all formal and informal complaints, as well as any suspected or known policy violations, immediately to the rector or clergy person in charge of the congregation (for parishes) or Canon to the Ordinary, Safe Church Coordinator, or bishop (for the dioceses). Church Personnel are required to report immediately any suspected or known policy violations to the rector, vicar, or ecclesiastical body in charge of the congregation.

All supervisors and decision-makers are expected to act promptly and appropriately to prevent (1) harassment in the workplace, and (2) retaliation against those who make a good faith complaint of harassment, or those who participate honestly and in good faith in either an investigation of a complaint or the opposing of illegal or prohibited harassment.

All complaints of harassment will be reviewed and investigated promptly and impartially by the Church’s management or its designee. Once Church management receives notice of any complaint of harassment, it will swiftly determine whether or not a fact-finding investigation is necessary. Any fact-finding investigation deemed necessary will be launched promptly. If appropriate, intermediate measures may be taken before completing the investigation to ensure that further harassment does not occur.

Moreover, the Church will protect the confidentiality of the allegations to the extent possible; however, no individual can be guaranteed absolute confidentiality. For example, information may have to be disclosed to those officials or Church Personnel with a need to know in order to carry out the purpose and intent of this Policy. However, unwarranted sharing of information about a

harassment report violates this policy and can lead to discipline against the person making the unnecessary disclosure, up to and including termination of that person.

Corrective or disciplinary action will be taken against any Church Personnel found to have engaged in harassment. Such action may include counseling, warning, suspension, or other appropriate disciplinary measures, up to and including termination.

The complaining party will be given prompt notice, to the extent appropriate, of the outcome of the investigation of the formal or informal complaint.

In addition to using the procedures set forth above, an employee or volunteer may consult an attorney and may file a complaint with the Civil Rights Department of the State of California or with the U.S. Equal Employment Opportunity Commission. They may also pursue any other remedies permitted by law. For further information, consult the publication of the Civil Rights Department attached to these policies as Exhibit \_\_\_\_\_. The publication in Exhibit \_\_\_ discusses sexual harassment, but its provisions apply equally to other types of harassment (such as harassment based on race, national origin, age, etc.).

## **General Definitions**

For purposes of this Policy, the term “Church Personnel” shall mean:

- All clergy whether stipendiary, non-stipendiary, or otherwise who are engaged in ministry or service to the Church;
- All paid personnel (including Church employees) whether employed in areas of ministry or other kinds of services by the diocese, its congregations, schools or other agencies.;
- Those who contract their services to the diocese, its congregations, schools, or other agencies;
- Volunteers, including any person who enters into or offers him or herself for a Church related service, or who actually assists with or performs a service, whether or not they have been selected or assigned to do so. Volunteers include members of advisory boards, vestries, bishop’s committees, boards of directors and advisory boards;
- All interns, persons in the ordination process, persons serving in field education assignments, persons in the diocesan discernment year.

For purposes of this Policy, the term “Church employees” shall mean all individuals hired by the Church who are employees of the Church for purposes of federal, state and/or local discrimination and harassment laws

For purposes of this Policy, the term “supervisors and decision-makers” shall mean:

- All persons who have the express authority to hire, select, supervise, discipline, promote, demote, terminate, set compensation or other terms and conditions of employment;
- All persons who have the express authority to recruit, duly appoint, select, license, discipline, supervise, terminate, or set terms and conditions of volunteer service;
- All members of decision-making bodies who have the authority to approve the creation of ministries, programs, Church activities, or personnel policies;
- Standing Committees, Diocesan Councils/Executive Boards, Vestries, and Bishop's Committees who appoint or approve Persons Who Have Pastoral Relationships as defined in this Policy including all Standing Committees, Commissions on Ministry, Vestries, Boards of Directors for Schools, Bishops Committees and the like.

## Title IV: Policy Regarding Clergy Misconduct

The Episcopal Diocese of Los Angeles is committed to prevent clergy misconduct within the Church and to respond with justice and compassion when misconduct occurs. The diocese and The Episcopal Church recognize that responding to allegations of misconduct requires determination, sensitivity, and respect for all persons affected, including the Complainant (the person reporting an offense), the Respondent (the clergy who is the subject of the reported offense), their families and friends, the congregation(s) involved, the diocese, and the whole church. The Church also endeavors to pursue paths of repentance, healing, restitution, and, whenever possible, reconciliation.

Title IV of the Canons of The Episcopal Church governs the handling of clergy misconduct, listing the following as offenses when they are “material and substantial or of clear and weighty importance to the ministry of the Church”:

- any act of sexual misconduct;
- holding and teaching publicly or privately, and advisedly, any Doctrine contrary to that held by the Church;
- engaging in any secular employment, calling, or business without the consent of the bishop of the diocese in which the Member of the Clergy is canonically resident;
- being absent from the diocese in which the Member of the Clergy is canonically resident, except as provided by the canons, for more than two years without the consent of the bishop diocesan;
- any criminal act that reflects adversely on the Member of the Clergy’s honesty, trustworthiness, or fitness as a minister of the Church;
- conduct involving dishonesty, fraud, deceit or misrepresentation;
- habitual neglect of the exercise of the ministerial office without cause; or habitual neglect of public worship, and of the Holy Communion, according to the order and use of the Church; and
- any Conduct Unbecoming a Member of the Clergy (any disorder or neglect that prejudices the reputation, good order and discipline of the Church, or any conduct of a nature to bring material discredit upon the Church or the Holy Orders conferred by the Church).

Anyone can report information concerning an offense by a member of the clergy. The report can be in written or oral form.

All suspected child abuse or sexual misconduct involving minors should be reported to Child Protective Services. All suspected elder abuse or the abuse of dependent adults should be reported to Adult Protective Services. Clergy are mandated by California law to report suspected child or elder abuse to the civil authorities.

Similarly, if you suspect any other illegal or criminal activity, you are strongly encouraged to contact the civil authorities and appropriately ensure your safety and the safety of others prior to contacting church leadership.

The Intake Officers of the diocese are trained to confidentially receive complaints regarding clergy misconduct and to make a determination whether the information in each complaint might constitute an offense under Title IV.

The Intake Officer will first determine if the information reported, if substantiated, would constitute an offense. If it would, the Intake Officer may conduct a preliminary investigation to gather more information or may immediately refer the matter to the Reference Panel as well as the Church Attorney.

Every effort shall be made to ensure the confidentiality of information received as part of the intake reporting procedure. Whenever possible, the name of the Complainant will be withheld if the Complainant so desires. Action requiring disclosure or identification of the Complainant in some manner will generally not take place without the Complainant's consent, unless it is necessary to protect the health or safety of others; if so, the Complainant will be informed. To also provide confidentiality for the Respondent, once a complaint is made to the Intake Officer, the Complainant will not be informed of subsequent action toward the Respondent unless or until such point as it is appropriate to share that information.

### **For Complainants: How does the procedure work?**

What can I expect from the Intake Officer?

- You will be listened to with respect.
- You will be offered pastoral care and a pastoral response.
- The Intake Officer will create a written report regarding your concerns.
- The Intake Officer will answer your questions about the investigation process.

You will also be offered an Advisor, a person familiar with the clergy disciplinary process, to assist you through the intake proceedings and any further process that may follow.

What decision-making authority does the Intake Officer have?

The Intake Officer determines whether the reported information might constitute an offense under Title IV, the church's disciplinary canons.

What happens if the Intake Officer determines that the information I provide might constitute an offense?

The Intake Officer promptly forwards a written intake report containing all information gathered about the complaint to the Reference Panel for further determination.

What is the role of the Reference Panel?

The Reference Panel — composed of the bishop, Intake Officer, and president of the Disciplinary Board — determines together which disciplinary process would be best to investigate and resolve the matter raised in the complaint. Depending on the nature of the allegations in the Intake Officer's report, the Reference Panel may refer the matter for:

1. A pastoral response by the bishop to resolve the matter;
2. conciliation, a conversational process with a Conference Panel intended to resolve the matter by either a) dismissing the complaint; b) reaching an Accord, a written agreement of all parties; or c) issuing an Order, a written determination of the offense; or
3. adjudication by a Hearing Panel which will more formally investigate the allegations. The panel may then, based on facts established regarding the alleged offense, dismiss the matter; or it may issue an Order determining the Respondent's offense.

In cases where Accords or Orders are reached, the bishop may subsequently issue a Sentence of appropriate discipline for the Respondent.

What happens if the Intake Officer determines that information I provided would not constitute an offense?

The Intake Officer can dismiss the matter. Before dismissing the matter, the Intake Officer must inform the bishop of his or her intention to dismiss. If the bishop does not object, then the Intake Officer dismisses the matter by preparing written notice that includes:

1. The decision to dismiss;
2. The reasons for dismissal;
3. An explanation of the Complainant's right to appeal the decision to dismiss within thirty days of the date of the notice.

The Intake Officer sends the notice of dismissal to both you as Complainant and the bishop.

Even if a complaint is dismissed by the Intake Officer, the bishop's office may offer pastoral counsel to you, the Respondent, and other parties involved to help resolve the matter.

What happens if I wish to appeal an Intake Officer's decision to dismiss the complaint?

The Intake Officer will offer to assist you in filing the appropriate paperwork of appeal to the president of the Disciplinary Board, who will review the appeal and determine whether or not to

overrule the Intake Officer's dismissal. When possible, a different Intake Officer may be assigned to assist you with your appeal.

The Episcopal Diocese of Los Angeles has a Disciplinary Board to review complaints that Intake Officers forward to them for further disciplinary action.

If you wish to give information regarding an offense of a member of the clergy in this diocese, contact one of the Intake Officers listed on the diocesan website (the Rev. Canon Thomas Discavage ([tdiscavage@ladiocese.org](mailto:tdiscavage@ladiocese.org)), or the Rev. Norma Guerra), or call the diocesan office at 213.482.2040. You will receive a response to your inquiry within 24 hours.

If a Complainant wishes to remain anonymous, the Intake Officer will take a "third person" report. This report allows a person to provide a detailed report about the offense without the obligation of pursuing an investigation and/or pressing charges. In such cases, the Disciplinary Board and diocese can initiate an investigation only after the appointed Reference Panel has reviewed the report and has recommended investigatory action.

If you wish to report an offense by a bishop, you may contact the leader of your congregation or directly contact the Intake Officer appointed by the Presiding Bishop of the Episcopal Church. The intake officer's contact information can be found on the Episcopal Church website for the office of pastoral development: <https://www.episcopalchurch.org/who-we-are/pastoral-development/>

The bishop is required to provide an appropriate pastoral response to any persons who are affected by an alleged offense, including the Complainant, the injured party(s) (if not the person reporting), and the Respondent.

Proceedings concerning bishops under Title IV follow a parallel process to that for diocesan clergy and are undertaken with the oversight of the Presiding Bishop's Office and a church-wide Disciplinary Board for Bishops.

### **For Members of the Clergy: What if I am accused of misconduct?**

All clergy Respondents to an allegation of misconduct will be offered a high standard of respect and representation throughout the Title IV process, and are assured of:

- An Advisor throughout the process solely dedicated to advising and helping you navigate the process and be present in all proceedings;
- the right to retain legal counsel in addition to the offered Advisor;
- an offer of pastoral care for you, your family, and the community in which you serve;
- a full, respectful hearing of your understanding of the matter;

- confidentiality during the Intake Process, except as required by civil law;
- any disclosure of information regarding substantiated allegations and outcomes of the disciplinary process undertaken with due care for all parties involved;
- an appraisal of your rights and options during each stage of the process;
- timely updates to keep you apprised of how the process is unfolding;
- the right to appeal Accords or Orders reached by panels in the disciplinary process up to the Provincial Court of Review.

As part of undertaking best practices for proper conduct of their ministry in the Church, and in conjunction with training in misconduct prevention, all clergy are strongly encouraged to read Title IV to gain familiarity with the terminology and process of the disciplinary canons, and to contact diocesan staff with any questions they might have.

# Responding to Concerns: Other Misconduct, Mandated Reporting, and Policy Violations

## Mandated Reporters

In the state of California mandated child abuse reporters include but are not limited to:

- Teachers and instructional aides (in both public and private schools)
- Administrators of both public and private daycares or youth centers, recreation program or other youth organization
- Licensees, administrators, and employees of licensed community care or child day care facilities
- Physicians, surgeons, psychiatrists, psychologists, dentists, nurses, therapists, and social workers
- A clergy member (meaning a priest, rabbi, religious practitioner, or similar functionary of the church, temple, or recognized denomination or organization)
- The custodian of records for a clergy member
- Athletic coaches

All mandated reporters are required to undergo training, and additional training for specific professions is required as well.

In the state of California, mandated elder abuse reporters are:

“Any person who has assumed full or intermittent responsibility for the care or custody of an elder or dependent adult, whether or not he or she receives compensation, including administrators, supervisors, and any licensed staff of a public or private facility that provides care or services for elder or dependent adults, or any elder or dependent adult care custodian, health practitioner, clergy member, or employee of a county adult protective services agency or a local law enforcement agency.”

## Suspected Abuse, Neglect, or Exploitation

Any person who has reason to suspect that abuse, neglect, or exploitation of children, youth, or adults has taken place, is strongly encouraged, and all mandated reporters are required, to contact the state’s legal authorities (Child Protective Services, Adult Protective Services, or the County Sheriff).

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

- The bishop or the bishop’s office for all cases;

- Member of the clergy in charge or the senior warden in the case of a congregation;
- The director, head, or other governing officer in the case of other organizations; and/or
- The Intake Officer in case a member of the clergy is suspected of abuse, neglect, or exploitation

In addition, the person suspecting abuse should fill out and send the [Confidential Notice of Concern](#) available on the diocesan website.

### **Suspected Violations of this Policy**

Anyone who suspects a violation of these policies shall immediately report the violation to the Responsible Person, member of the clergy in charge, senior warden and the diocesan safe church officer.

Clergy in charge receiving reports of violations of this policy shall be responsible for providing appropriate pastoral care to all those affected and appropriate remedial and/or disciplinary action up to and including termination of employment or of unpaid ministry with the church. A Responsible Person who is a lay person must ensure that appropriate pastoral care is provided for all.

Anyone who suspects a violation of these policies by a member of the clergy shall immediately report the violation to the bishop's office and/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, shall be 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 unpaid ministry with the diocese.

### **Misconduct or Inappropriate Behavior by a Member of the Congregation or Staff (Pastoral Ministry Agreements)**

If a member of the congregation has poor boundaries, makes others feel uncomfortable in their physical mannerisms or topics of conversation, or violates any of these policies and practices, a member of the parish staff, preferably the Rector, Vicar, or Priest in Charge, should initiate a pastoral conversation with that person. They should explain what behavior is not allowed, and make a Pastoral Ministry Agreement that includes reconciliation and a plan of action for future conduct, including consequences for further violations.

If a member of the staff or a volunteer has a "flag" appear on a background check, that is not an immediate disqualifier for ministry. The Rector, Vicar, Priest in Charge, or staff person in charge of the ministry they are volunteering for should have a pastoral conversation about the incident. After

discussion they may deem the issue irrelevant. If it could have an impact on their ministry (for example a DUI or financial crime) the staff person and the volunteer will make a Pastoral Ministry Agreement that outlines future conduct and any limitations to that person's participation in specific parts of the life of the congregation.

### **Local Resources for Response**

Each congregation or organization shall provide to anyone concerned about possible violations of this policy a list of local resources that can give information and assistance, with contact information. . Such resources may include:

- Responsible Person(s) for programs and ministries with children and youth;
  - In the Episcopal Diocese of Los Angeles, this is Missy Morain, Missioner for Christian Formation, Children and Youth - [mmorain@ladiocese.org](mailto:mmorain@ladiocese.org)
- Clergy in charge of a congregation;
- Wardens;
- Bishop;
- Intake Officer(s);
  - Names and contact information at <https://diocesela.org/reporting-abuse-or-misconduct/>
- Child Protective Services.
  - [cdss.ca.gov/Reporting/Report-Abuse/Child-Protective-Services](https://cdss.ca.gov/Reporting/Report-Abuse/Child-Protective-Services)
  - Los Angeles County 800-540-4000
  - Ventura County 805-654-3200
  - San Bernardino County 800-827-8724
  - Orange County 800-207-4464
  - Santa Barbara County 800-367-0166
  - Riverside County 800-442-4918
- Adult Protective Services
  - [cdss.ca.gov/Adult-Protective-Services](https://cdss.ca.gov/Adult-Protective-Services)
  - 1-833-401-0832 and when prompted enter your 5-digit zip code to be connected to the Adult Protective Services in your county, 7 days a week, 24 hours a day.
- Sheriff's Office

# Compliance with Whole and Healthy Church

## Safe Church Self-Audit

Each congregation is required to conduct a Safe Church Self-Audit annually to confirm compliance with diocesan safe church policies within the congregation. A copy will be returned to the diocesan office along with the annual parochial report. The Congregational Safe Church Self-Audit is with the sample forms.

Procedures to be confirmed by audit will include (but are not limited to):

- application forms and relevant records for screening and verification of volunteers and paid employees (a Volunteer Application form may found with the sample forms)
- set background and reference checking procedures
- individual records of compliance with relevant diocesan training requirements
- incident reporting procedures (Incident Report form may be found with the sample forms)
- diocesan and site-specific behavior standards signed by all staff and volunteers covered by their provisions
- evidence of compliance with these requirements, including records of receipt of these policies by all staff and volunteers.

## Local Adaptations

Congregations may adopt local safe church procedures that are consistent with or exceed the requirements in this policy. Site-specific additions to diocesan policies — where permitted — should be described in detail and should include the circumstances under which those additions should be permitted, and be approved by the vestry or bishop's committee.

When these policies cannot be followed, an explanation of why and what measures are being taken instead should be written and on file in the parish office. Informed non-compliance with these policies is allowed in specific circumstances but should not be done lightly or often.

## Distribution of the Policies

Congregational safe church policies should be posted in areas where activities for children, minors, youth, or adults take place, and should be given to parents/guardians and all paid persons, volunteers, and clergy whose ministries include contact with minors or vulnerable adults.

Congregational policies should include the names and phone numbers of the rector/vicar or priest, senior warden, and contact person in the bishop's office (Safe Church Coordinator Missy Morain [mmorain@ladiocese.org](mailto:mmorain@ladiocese.org) 213.905.0181) and should outline the procedures for reporting incidents or

suspected policy violations. Incident Report forms and Confidential Notice of Concern forms should be readily accessible to those who might wish to make a report.

It's not enough to train the volunteers and staff alone. All members of a congregation are impacted by safe church policies and therefore should be given adequate opportunity to understand this policy, its local application, and their responsibility for meeting its requirements. This policy strongly encourages a congregation-wide program of awareness-building and education — including but not limited to preaching, adult education, parenting education, youth and children's awareness and education, and use of communications media such as newsletters, bulletins, and website — to ensure that all members of the community have a chance to understand and support the safe church practices as they are implemented.

## Training and Screening Requirements

Due to the changing nature of technology and state and federal laws, an up-to-date chart of training and screening requirements, along with instructions on how to access them can be found at:

All clergy and ordinands will have background checks conducted by Oxford Document Management as well as completing livescan background checks in order to comply with California Assembly Bill AB506.

All lay professionals and volunteers will complete livescan background checks in compliance with California Assembly Bill AB506 as well as additional background check options as needed for their appropriate roles.

All congregations, parishes, and missions must use the training provided by Praesidium Academy for training.

Diocesan institutions and schools may use Praesidium Academy or can find another training which is contextually appropriate for their institution. This training must be approved by the Episcopal Diocese of Los Angeles Safe Church Officer, Missy Morain, every 3 years.

Scouting America, previously known as Boy Scouts of America, will work with the diocese on a case by case basis. The following ground rules must be followed:

- everyone working with children, youth, or vulnerable adults must be trained
- no one may be on campus supervising who is not trained
- Scouts must provide a list to the Episcopal Diocese of Los Angeles on a yearly basis which includes all those individuals who are a part of the program. This list must include the names of those adults who work with young people, proof of background checks, and proof of child abuse misconduct prevention training
- all organizations must sign a building use policy with the church, parish, or mission

Tenants of Episcopal organizations must follow all legal requirements for training and screenings as set by the State of California and provide proof of training and screening to the organization, as well as following all requirements as set out by their contract with the parish and the Episcopal Diocese of Los Angeles.

## Congregational Whole & Healthy Church Self-Audit for Annual Review

This is a list of key points to go over with your staff every year.

### Screening of Ministry Leaders

There is a well-established process for screening staff and volunteers who minister with and to children, youth, and adults, which includes:

- o A written application (include a copy or link to online form)
- o A personal interview (include a copy of your questions)
- o Verification of personal references
- o Criminal public records check through Live Scan fingerprinting

Individual records of these screening procedures are located:

These staff members who have access to these records.

Provide additional notes, if any, about Screening of Ministry Leaders.

### Training of Ministry Leaders

All paid employees and any volunteers whose ministry includes regular contact with children, youth, or adults, must have completed Whole & Healthy Church training, either online or in-person, within the past 3 years. This includes a signature by each applicant verifying receipt of a copy of this policy, including any local procedures or variations.

Records of this training are located:

These staff members have access to these records:

### Safe Program Space

- o There are always two or more unrelated adults present in ministry settings, meetings, and events
- o All program space is visually accessible
- o Alcoholic beverages are not stored in publicly accessible areas of the church buildings
- o Publicly accessible computers with internet access are password protected
- o The parish Wi-Fi is password protected
- o Keys to church spaces are limited to people who have met all the requirements for screening and training of volunteers
  - o Records of who has keys are kept:

## **Program Documentation**

There is documented vestry/bishop's committee approval, and individual parent/guardian approval for:

- o All programs for children and youth that are hosted off-site or in private residences
- o Sexually explicit conversation or program content
- o The screening of R-rated movies for children and youth

The following documents are on file for all programs involving children and youth:

- o Registration forms
- o Medical release forms
- o Image release forms
- o Field trip and transportation forms for off-site programming

These records and forms are located:

These staff members have access to these records:

These records are kept for 3 years after the child or youth has left the congregation or when they turn 18

These records are shredded or disposed of securely 3 years after the child or youth has left the congregation or when they turn 18.

## **Congregational Education**

There is one or more annual communication to the entire congregation explaining the provisions and requirements of Whole & Healthy Church.

The congregation has adapted and modified Whole & Healthy Church to address their specific ministry context.

Whole & Healthy Church and the congregation's specific policy are posted in public areas, along with the names and contact information of the rector/vicar/priest-in-charge, the diocesan Whole & Healthy Church contact, and a description of the procedures for reporting incidents of suspected policy violations.

Whole & Healthy Church and the congregation's specific policy are posted in an easily findable section of the parish website, along with the names and contact information of the rector/vicar/priest-in-charge, the diocesan Whole & Healthy Church contact, and a description of the procedures for reporting incidents of suspected policy violations.

## Sample Confidential Notice of Concern

Available online at:

<https://www.cognitofrms.com/EpiscopalDioceseOfLosAngeles/ConfidentialNoticeOfConcern>

Once you have completed this form please close in a sealed, confidential envelope, and deliver or mail to the rector or wardens in the parish office. Or mail to the Bishop's Office attn: Missy Morain, Missioner for Christian Formation, Children, Youth 840 Echo Park Ave., Los Angeles, CA 90026. You may also email [mmorain@diocesela.org](mailto:mmorain@diocesela.org) or fill out the online version here (<https://www.cognitofrms.com/EpiscopalDioceseOfLosAngeles/ConfidentialNoticeOfConcern>)  
Individual(s) of Concern

Congregation & City

Date & Time of occurrence

Type of Concern

- Inappropriate behavior with a child or youth
- Inappropriate behavior with an adult
- Policy violation with a child or youth
- Policy violation with an adult
- Possible risk of abuse to a child or youth
- Possible risk of abuse to an adult
- Other concerns

Please describe the situation.

(What happened? Where and when? Who was involved? Who was present?)

Have you reported this to legal authorities?

(eg. Child Protective Services or Adult Protective Services)

What action was taken?

(How was the situation handled? Who was involved? Who was questioned?)

What is the follow up plan?

(Does anyone else need to be notified? Will the situation need monitoring?)

Would you like someone to contact you to discuss this situation?

Submitted by

Phone Number

Email

## Sample Incident Report

*As close as possible to the time the incident occurred, a copy of this report should be filled out by the Responsible Person. Other eyewitnesses to the incident (preferably adults) may also fill out additional copies of this form.*

Date of Incident

Date Report Filed

Person Filing Report

Location and time of incident

Description of the incident

Your involvement in the incident

Individuals who were injured and a description of the injuries

Description of action taken on behalf of the injured

Names of others involved in the incident or witnesses

Name of Responsible Person at the time of the incident and their position in the congregation (ex, paid staff, volunteer, clergy)

Cause of the incident (in your opinion)

Additional Comments

## Sample Field Trip Permission

Dear Parent or Legal Guardian:

Your child is eligible to participate in a parish-sponsored activity requiring transportation to a location away from the parish grounds. This activity will take place under the guidance and supervision of adult chaperones. A brief description of the activity follows:

Name of event

Destination

Designated supervisor of activity

Date and time of departure

Date and anticipated time of return

Method of transportation

Participant costs

If you would like your child to participate in this event, please complete, sign and return the following statement of consent and release of liability. As parent or legal guardian, you remain fully responsible for the actions and conduct of your child.

I hereby consent to participation by my child \_\_\_\_\_ in the event described above. I understand that this event will take place away from the parish grounds and that my child will be under the supervision of designated responsible persons from the parish on the stated dates. I further consent to the conditions stated above on participation in this event, including the method of transportation.

In consideration of my child being allowed to participate in this field trip, I hereby agree, on behalf of myself and my child, to release \_\_\_\_\_ Parish, the Episcopal Diocese of Los Angeles, and any and all affiliated organizations, their employees, volunteers, agents, and representatives, including volunteer drivers (collectively "Releasees"), from any and all claims, including negligence, which may be asserted by me or my child, or on behalf of my child, arising from or relating to my child's participation in the field trip. In the event this release on behalf of myself and my child is held to be invalid or unenforceable, I hereby agree to indemnify and hold harmless Releasees from any and all claims, including negligence, which may be asserted by me or my child, or on behalf of my child, arising from or relating to my child's participation in the field trip. This release or indemnification does not apply to claims for intentional misconduct or gross negligence; nor does this release or indemnification apply to the extent of commercial insurance coverage for any claim, but this release or Indemnification shall apply to the extent of any self- insurance or deductible applicable to any claim.

Parent or guardian's name — print

Parent or guardian's signature

## Sample Health Form for Minors

### EVENT/CONGREGATION

#### Personal Health & Medical Information /Authorization

This Agreement and Release is between \_\_\_\_\_  
("Participant") and The **NAME**[e.g., name of church] regarding the participation of Participant in the **EVENT** ("Event").

In the event of an accident or serious illness, I hereby authorize the **NAME** or its representative an event staff member to obtain medical treatment for Participant. I hereby hold harmless and agree to indemnify **NAME** and its employees, volunteers, agents, and other representatives from any claims, causes of action, damages and/or liabilities, arising out of or resulting from said medical treatment. I further agree to pay any and all expenses including medical expenses that may derive from any injuries to Participant that may occur during his/her participation in the **EVENT**.

During this event, I can be reached by phone at \_\_\_\_\_. If I cannot be reached by phone, the **NAME** or one of its representatives has my permission to authorize medical treatment for Participant. This authorization includes the securing of medical, dental, emergency or hospital treatment, including surgery, x-rays, drugs, and anesthesia.

I hereby certify that I have read and fully understand the above authorization for medical treatment. I accept all financial responsibility for the same. I also certify that no guarantee or assurance has been made as to the results that may be obtained.

Attachment A, which covers administration of OTC medications and continuation of current prescription medications and other treatments, is attached hereto and incorporated by reference.

\_\_\_\_\_  
*Parent/Guardian Signature and Date*

\_\_\_\_\_  
*Parent/Guardian Signature and Date*

\_\_\_\_\_  
*Cell/Home phone number*

\_\_\_\_\_  
*Cell/Home phone number*

**Does Participant have health/accident insurance? (circle one)**                      **YES**                      **NO**

If yes, please attach to this form a copy of the front and back of Participant's insurance card and also fill in the following:

Insurance carrier: \_\_\_\_\_

Policy holder: \_\_\_\_\_

Policy holder DOB: \_\_\_\_\_

Identification Number: \_\_\_\_\_

Group Number: \_\_\_\_\_

## Attachment A

**This Attachment A has two sections, one on over-the-counter medications that might be needed during the event and the other on prescriptions and other current medical treatment that the child is being provided and that should be continued during the event. The REQUIRED signature at the end covers both sections**

### OVER-THE-COUNTER MEDICATIONS

**NAME** and its representatives have access to minor first aid supplies, including over-the-counter medications. If Participant becomes ill or suffers a minor injury, we must have parental authorization to dispense medications. Below is a list of common over-the-counter medications. By signing at the end of this Attachment A, I authorize that the following OTC medications may be given to Participant if the need arises. I shall indemnify and hold harmless NAME and its employees, volunteers, representatives, and agents against any claims that may arise relating to the administration of these over-the-counter medications.

The following over-the-counter medications may be administered (check all that apply):

- Sunscreen
- Bug repellent
- Ointments for minor wound care or first aid as directed, including antiseptic, anti-itch, anti-sting, antibiotic, sunburn.
- Tylenol/Acetaminophen as directed.
- Ibuprofen as directed.
- Throat lozenges and/or spray as directed for sore throat.
- Hydrocortisone ointment as directed for mild skin irritations, rashes, insect bites.
- Medicated powder for skin irritation as directed.
- Medicated lip ointment for dry, chapped lips, lip blisters or canker sores as directed.
- Kaopectate or Imodium for diarrhea as directed.
- Milk of Magnesia, Pepto-Bismol, or Mylanta for upset stomach or nausea as directed.
- Rolaids or Tums for acid reflux, heartburn, or indigestion as directed.
- Benadryl for swelling, hives, allergic reaction as directed.
- Actifed or Sudafed as directed for nasal congestion or allergy relief as directed.
- Visine or other eye drops for minor eye irritation.
- Robitussin or other cough syrup as directed.

Circle appropriate response:	Circle one		Please identify or explain:
Does Participant have medical conditions that staff should be aware of?	YES	NO	
Does Participant have a history of allergies or reactions to medications, insect stings, or plants?	YES	NO	
Does Participant have any dietary or special health requirements?	YES	NO	

**PRESCRIPTION MEDICATIONS AND OTHER EXISTING TREATMENTS**

The following list includes all prescription medications and other treatments currently being provided to Participant, IF those medications and other treatments need to be continued during the event covered by the permission form. The prescriptions and other treatments include: lotions, creams, inhalers, liquids, allergy medications, cold medications, injections, and temporarily prescribed medication, and include all over the counter medications, vitamin/mineral supplements, herbs, homeopathic remedies, and other treatments.

**If the parent/guardian wishes the Participant to take any current prescription medication or other treatment during the **EVENT**, the parent/guardian must provide the medication or treatment. Prescription medications must be in original and current container**

By signing at the end of this Attachment A, I authorize that the following OTC medications may be given to Participant if the need arises. I shall indemnify and hold harmless NAME and its the staff and all officers, directors, employees, volunteers, representatives, and agents against any claims that may arise relating to the administration of these over-the-counter medications.

If changes to medical condition and/or medication occur and are different from what is listed on this form, please notify us upon arrival at (EVENT).

Name of Medication or other treatment currently being provided	Dosage	Times	Comments or special instructions (eg., take with food or water, split tablet, etc.)


Signature of parent/guardian: \_\_\_\_\_ Date signed: \_\_\_\_\_

## Sample Driving Permission for Minors

*For other people to drive minors somewhere:*

I give my permission to \_\_\_\_\_ (name of driver)  
to transport my child(ren) \_\_\_\_\_ (name of child or  
children)

to, from and during the activities or meetings listed below (please list as much detail as possible  
including dates and times):

\_\_\_\_\_

During these activities I may be reached at:

Home Phone # \_\_\_\_\_ Mobile Phone # \_\_\_\_\_

If I cannot be reached in the event of an emergency, the following person is authorized to act on my  
behalf:

Name \_\_\_\_\_ Phone # \_\_\_\_\_

Relationship to participant \_\_\_\_\_

Parent/legal guardian name (printed) \_\_\_\_\_

Signature of parent/legal guardian \_\_\_\_\_

Date \_\_\_\_\_

For minors to drive themselves somewhere:

I give my permission to my child \_\_\_\_\_ (name of child) to drive  
themselves

Optional: and their sibling(s) \_\_\_\_\_ (names of siblings)

to, from and during these activities or meetings listed below (please list as much detail as possible  
including dates and times):

\_\_\_\_\_

During these activities I may be reached at:

Home Phone # \_\_\_\_\_ Mobile Phone # \_\_\_\_\_

If I cannot be reached in the event of an emergency, the following person is authorized to act on my  
behalf:

Name \_\_\_\_\_ Phone # \_\_\_\_\_

Relationship to participant \_\_\_\_\_

Other comments \_\_\_\_\_

Parent/legal guardian name (printed) \_\_\_\_\_

Signature of parent/legal guardian \_\_\_\_\_

Date \_\_\_\_\_

## Sample Minor Image Release Form

Event name: \_\_\_\_\_ Participant's name: \_\_\_\_\_

Age: \_\_\_\_\_ Event date: \_\_\_\_\_

Email: \_\_\_\_\_ Church: \_\_\_\_\_

I give the Episcopal Diocese of Los Angeles and \_\_\_\_\_ permission to take photographs, video, and/or record the voice of

\_\_\_\_\_, a minor, and to use those images and recordings in Episcopal Church print and online publications only and following diocesan policies regarding social media.

Date: \_\_\_\_\_ Relationship: \_\_\_\_\_ Signature: \_\_\_\_\_

## Sample Volunteer Application

LAST NAME            FIRST                    MIDDLE  
STREET ADDRESS CITY                    ZIP  
Best time to contact you:  
PHONE                    EMAIL

Have you ever been convicted of a criminal offense (misdemeanor or felony)? Exclude minor traffic violations. If yes, give details. A conviction will not necessarily disqualify you.                    YES    NO

Have you ever been accused of physically, sexually, or emotionally abusing a child or an adult? If yes, please explain.                    YES    NO

Has a family member, friend, supervisor, or acquaintance ever confronted you about the appropriateness of your behavior towards children, youth, or vulnerable adults? If yes, please explain.                    YES    NO

List your home addresses for the past three years

STREET ADDRESS CITY    ZIP                                    DATES

### Personal Data

For which position(s) are you applying?

What interests you about the position?

What has prepared you for the position?

### VOLUNTEER / PROFESSIONAL / PERSONAL REFERENCES

Please list at least two volunteer, professional, or personal references. It is preferable that your references be individuals from previous volunteer or employment organizations who can provide information regarding your job-related capabilities.

### References

NAME

RELATIONSHIP

POSITION

ORGANIZATION / LOCATION

PHONE

EMAIL

Please include employment and volunteer experience, especially any experience working with children and youth. Alternately, you may attach a current resume or CV with supervisory and contact information.

Experience  
ORGANIZATION  
ADDRESS  
CONTACT  
PHONE                      EMAIL  
DATES (FROM – TO)  
DUTIES

CODE OF CONDUCT AND ACKNOWLEDGMENT, RELEASE, AND SIGNATURE  
WHOLE & HEALTHY CHURCH

Please read and initial each item to signify your agreement to comply with the statement.

\_\_\_\_\_ I agree to do my best to prevent abuse and neglect among children, youth, and adults involved in church activities and services.

\_\_\_\_\_ I agree not to physically, sexually or emotionally abuse or neglect a child or youth.

\_\_\_\_\_ I agree to comply with the policies as outlined in Whole & Healthy Church and the policies of \_\_\_\_\_ church.

\_\_\_\_\_ In the event that I observe any inappropriate behaviors or possible policy violations with children, youth, or adults, I agree to immediately report my observations.

\_\_\_\_\_ I understand that the church will not tolerate abuse of children, youth, and adults, and I agree to comply in spirit and in action with this position.

To the best of my knowledge, the information contained in this application is complete and accurate. I understand that providing false information is grounds for not hiring me or choosing me for a volunteer position or for my discharge if I have already been hired or chosen.

I authorize any person or organization, whether or not identified in this application, to provide any information concerning my previous driving record, criminal conviction record, sexual offender registry or any other qualifications that \_\_\_\_\_ Church or the Episcopal Diocese of Los Angeles deems necessary to evaluate me for this volunteer position. I also authorize \_\_\_\_\_ Church, or the Episcopal Diocese of Los Angeles to request and receive such information.

I also understand that my volunteering may be terminated, or any offer or acceptance of volunteering withdrawn, at any time, with or without cause, and with or without prior notice at the option of \_\_\_\_\_ Church, the Episcopal Diocese of Los Angeles or myself.

Nothing contained in this application or in any pre-volunteering communication is intended to or creates a contract between myself and \_\_\_\_\_ Church, or the Episcopal Diocese of Los Angeles for either volunteering or the providing of any benefit.

I HAVE READ AND UNDERSTAND THE ABOVE PROVISIONS.

Name (please print)

Signature

Date

## Sample Volunteer Driver Application

*Volunteer drivers must comply with all the application, screening, and training of volunteers along with filling out this form. They may be subject to additional public records checks pertaining to driving record.*

*These forms must be kept with the permission forms for the off-site activity or field trip.*

### Driver

Name

Address

Phone            Email

Date of Birth

Driver's license #

### Vehicle(s)\* that will be used

Name of owner

Address (street)                      Address (city/zip)

Registration expiration date

Year and make

Model

License plate #

\* If more than one vehicle is to be used, required information must be provided for each vehicle.

### Insurance information

(Note: When using a privately-owned vehicle, the insurance coverage is the limits of the insurance policy covering that specific vehicle.)

Insurance company

Policy #

Expiration date

Liability limits of policy\*\*

\*\* Please note: The minimum acceptable liability limit for privately owned vehicles is \$500,000 CSL (Combined Single Limit).

### Certification

I certify that the information given on this form is true and correct to the best of my knowledge. I understand that, as a volunteer driver, I must be 25 years of age or older, hold a valid non-probationary driver's license, have no physical disability that may impair my ability to drive safely, and have required insurance coverage in effect on any vehicle used to transport students.

Driver's name (print)

Driver's signature

Date