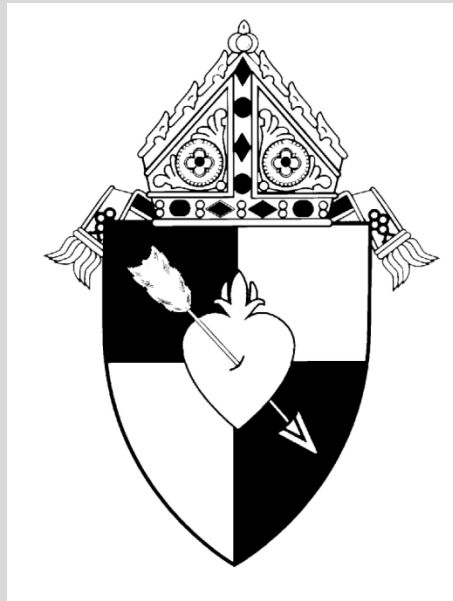


**Diocese  
of  
St. Augustine**



**Safe Environment Program  
Handbook  
2015 Revision**

**Notes on this revision:**

1. Changes from the last version are indicated by a vertical line in the left margin, and being underlined as this sentence is underlined.
2. Some documents refer to the diocesan website (www.dosafl.com). The most current versions of Safe Environment documents are found there. Click on the “Safe Environment” tab.

April 30, 2015 P.J.G.



# DIOCESE OF ST. AUGUSTINE

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## Office of the Bishop

June 3, 2011

### Diocese of St. Augustine Safe Environment Program

Though the Diocese has had a safe environment program in one form or another in place since 1998, I take this opportunity to re-promulgate and reiterate as official diocesan policy our current safe environment program. This letter supersedes previous letters issued by my predecessor, Bishop Victor Galeone.

All elements of our diocesan safe environment program have been in place for some time. All of these elements are required by the U.S. Conference of Catholic Bishops (USCCB) *Charter for the Protection of Children and Youth*, and the essential norms deriving from the Charter. The essential norms, having received the *recognitio* of the Holy See, are particular law in the dioceses of the United States. In addition to children and youth, all dioceses in the Province of Miami also apply the protections of the Charter and Norms to vulnerable adults as defined in Florida law.

More specifically, the diocesan safe environment program consists of the following component parts:

– The background check / screening program for clergy, religious, lay employees, educators and covered volunteers. Here I want to emphasize that, when required, background checks and screening must be completed **before** the person assumes his or her position or begins volunteer service; there can be no compromises or exceptions regarding this aspect of our Safe Environment Program.

– The *Protecting God's Children* program designed to educate clergy, religious, employees, educators and volunteers in ways and means to establish and maintain a safe environment for children and youth.

– The *Touching Safety* and *Children & Youth Personal Safety* program alternatives, designed to help children and youth to cooperate in maintaining their own personal safety. It is of vital importance that every child and every youth in our Catholic schools, religious education programs and parish youth programs be given the opportunity to take part in this critical element of our Safe Environment Program. Here again, there can be no compromises or short-cuts taken.

All of the above component parts of our diocesan program are in full compliance with the requirements of the USCCB's Office for the Protection of Children and Youth, and I direct that they continue to be fully implemented in each parish, school and agency of this diocese.

Finally, we will continue to evaluate all of the components of the safe environment program. Whenever changes are called for, or improvements are possible, we will strive to implement them expeditiously.

Thank you for your cooperation in this most important area of concern for our entire diocese.

Sincerely in Our Lord,

Most Reverend Felipe J. Estevez, D.D., S.T.D.  
Bishop of St. Augustine

**Diocese of St. Augustine**  
**Safe Environment Program**  
**Handbook for Pastors, School Principals, Diocesan Staff & Parish Leaders**

**Introduction.** The *Charter for the Protection of Children & Young People* (the Charter), adopted by the U.S. Conference of Catholic Bishops (USCCB) in 2002, is designed to insure that a “safe environment” exists for every young person within our parish and church communities. The Charter requires that dioceses take some very specific and very significant steps to implement the USCCB’s safe environment program, and to thereby breathe life into its promise of an atmosphere of trust, respect and charity which should and must exist within the Church.

**Three Part Program.** There are three components to the Charter’s safe environment program,

**Part I – *Education of Adults*:** about maintaining a safe environment for children and youth

**Part II – *Education of Children*:** so that they can be alert to their surroundings and better cooperate in our efforts to keep them safe

**Part III – *Keeping the Environment Safe*:** education, background checking, record keeping, and ethical standards

and therefore three components to the safe environment program of the Diocese of St. Augustine:

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**Part 1 – Education of Adults**

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**Protecting God’s Children Program.** In the Diocese of St. Augustine, the education of adults is primarily accomplished by way of the *Protecting God’s Children Program* of the VIRTUS organization. This program is a three hour informational class which discusses:

- early warning signs of inappropriate relationships with children,
- appropriate communications with, and access to children,
- appropriate monitoring of children and children’s programs,
- the importance of parents’ being aware and communicating with their children, and
- how and where parents and others can raise concerns or make reports in specific cases.

**Who Must Attend.** It is diocesan policy that the *Protecting God’s Children* program will be attended by:

- All clergy and religious who have a ministerial assignment, or engage in any ministry in the Diocese of St. Augustine, as well as all seminarians and permanent deacon aspirants.
- All lay employees (full or part-time) of a parish, school or diocesan agency.
- All **covered** volunteers in any parish, school or diocesan agency - those volunteers who are entrusted with the care or supervision of children, youth or vulnerable adults.

**Where & When.** *Protecting God’s Children* classes are held on a frequent basis throughout the diocese. Dates, times and locations of upcoming classes are announced each week on the diocesan web site, [www.dosafl.com](http://www.dosafl.com), and on the VIRTUS web site, [www.virtus.org](http://www.virtus.org), as well.

**How To Sign Up for a Class.** Those who need to attend a *Protecting God’s Children* class can register on-line for a class at [www.virtus.org](http://www.virtus.org). On-line registration is the preferred way to sign up for a class, or one can simply contact the parish or school where the class is to be given. You can also sign up for a class by contacting the diocesan Safe Environment Coordinator at (904)262-3200, ext. 104.

**How Attendance Is Documented.** Those completing the *Protecting God’s Children* class will be given a certificate. In addition, class attendance can be documented by the class sign-in sheet, or

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## Part 2 – Education of Children and Youth

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**Programs.** In the Diocese of St. Augustine, the education of children and youth is accomplished by way of one of the two following programs:

***Touching Safety Program*** (VIRTUS organization), **or**

***Children & Youth Personal Safety Program*** (adapted from the Diocese of Harrisburg’s *Formation in Christian Chastity Program*).

The *Touching Safety Program* information and the *Children & Youth Personal Safety Program* lesson plans are available on the Diocese of St. Augustine web site, [www.dosafl.com](http://www.dosafl.com) – click on the “Safe Environment” tab at the top of the Home Page, then select “Safe Environment” from the drop down menu. A brief summary of each of these programs’ lesson plans is also included at Appendices 4 and 5, respectively, of this Handbook.

***PLEASE NOTE*** > Either the *Touching Safety Program* or the *Children & Youth Personal Safety Program* is a required part of each parish religious education and youth program for children and youth who do not attend Catholic schools. One or the other program is also a required part of the curriculum in all Catholic schools in the diocese. A chart comparing these two alternative programs is provided at Appendix 6 of this Handbook. A parish or school may implement either of these programs.

**Parents: The First and Best Teachers.** The Church has always believed that the parent is the first and best teacher of their child, not only in the ways of the faith, but in the affairs of the world as well. Thus, if a parent believes that any or all of the lesson plans of the *Touching Safety Program* are in any way, or for any reason inappropriate for their child, the parent may opt their child out of any of the *Touching Safety* lessons.

**In Case of Opt-Outs.** If the parent opts their child out of a lesson, the parent will be directed to the opted-out lesson plan on the internet (or be provided with a copy of the lesson plan), and will be asked to consider going over the contents of the lesson plan with their child, or at least discussing

the general issues addressed in the lesson plan with their child. **This must be done in parishes by way of a letter from the pastor (or DRE), and in schools by way of a letter from the principal.** This is a USCCB Office of Children and Young People requirement.

To assure this opt-out opportunity, the parish religious education program and school will provide the parent with:

- advance notice at the beginning of an academic year or semester, or at least well in advance of when a *Touching Safety* lesson will be taught, and a reference to where the contents of that lesson plan can be reviewed on the internet, and
- an opt-out form to be completed by the parent if the parent does not want their child to attend a particular class or classes. Parents should be clearly told what the “return by” date is for the opt-out forms.

**PLEASE NOTE** > The fingerprinting, background check and screening of all clergy, religious, lay employees and covered volunteers **must be completed before** they commence their duties or begin work.

**PLEASE NOTE** > As the *Children & Youth Personal Safety Program* focuses strictly on personal safety within the context of Catholic moral theology, there is no opt-out provision for this program. It is an integral part of the doctrinal and moral teachings of the faith.

**Touching Safety Program Opt-Out Record Keeping.** The opt-out form should be returned to the child’s religious education or school teacher. The teacher should make sure that the form is given to the parish DRE or school principal, who will insure that all opt-out forms are maintained on file in the parish DRE’s office, school office, or elsewhere as directed by the pastor or principal. Opt-out files are subject to review by the diocese and by the USCCB safe environment program auditors.

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### **Part 3 – Keeping the Environment Safe**

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**Checks and Counter-Checks.** The final part of the diocesan effort to insure a safe environment for all children and young adults involves concrete actions to prevent unsafe conditions from ever arising, and to spot potential existing unsafe circumstances before any harm can be done. This part of the diocesan program involves:

- the screening of clergy, religious, lay employees and certain volunteers by way of fingerprinting (LiveScan) and background checking,
- coordinating and facilitating the *Protecting God’s Children* classes discussed in Part 1,
- establishing record-keeping requirements to insure that these programs are, in fact, being carried out,

- monitoring these record-keeping requirements on the diocesan level, and finally,
- attempting to actually describe what a safe environment for children and young people should look like in “real life” by establishing standards of ethical conduct.

**The Personnel Screening Policy of the Diocese of St. Augustine.** Diocesan policy states that all church personnel and volunteers must allow an inquiry into their backgrounds to assess whether there is any reason to suggest the person is not suitable for the position sought or volunteer function to be engaged in.

The actual screening of all results of all background checks is done, according to diocesan policy, by Director of the Diocesan Office of Human Resources.

**Who Must Be Fingerprinted, Background Checked, and Attend the *Protecting God’s Children Class*.** The chart at Appendix 8 of this Handbook explains just who in the diocese must undergo fingerprinting and background checks, and who must attend a *Protecting God’s Children* class.

**IMPORTANT: See Appendix 9 for State of Florida Requirements which may apply.**

**Volunteers, “Covered” Volunteers, and Their Screening and Training Requirements in the Diocese of St. Augustine**

**Who Is a Volunteer?** Volunteers are those persons who freely assist a parish or diocesan ministry, school, or any other agency of the Diocese of St. Augustine with their time and talents. Volunteers are truly the life-blood of the apostolic works of the diocese; we could not function without their invaluable assistance. Volunteers, by definition, **are not paid** any form of compensation. A church worker who is paid any form of compensation (other than reimbursement for actual out-of-pocket expenses) is an employee and not a volunteer.

***PLEASE NOTE*** > Not all volunteers in a parish, school or diocesan office need to be fingerprinted & background checked, and attend a *Protecting God’s Children* class. But some volunteers are called **covered** volunteers. A covered volunteer is one who **does** need to be fingerprinted & background checked, **or** who needs to attend a *Protecting God’s Children* class, **or** who needs to do both of those things before beginning his or her volunteer service.

**Who Is a Covered Volunteer?** Some volunteers are **covered** volunteers. A covered volunteer is 18 years of age or older, and is defined in the Ecclesiastical Province of Miami (all of the dioceses in Florida) as follows:

“Covered Volunteer – shall mean any unpaid person who is engaged or involved in any (arch)diocesan institution or parish activity, *and who is entrusted with the care or supervision of:*

- 1.) children [*those below the age of 18*], or

2.) vulnerable adults.” [“*Vulnerable adult*” is defined in the Florida Statutes as a person 18 years of age or older whose ability to perform the normal activities of daily living or to provide for his or her own care or protection is impaired due to a mental, emotional, physical, or developmental disability or dysfunctioning, or brain damage, or the infirmities of aging.]

Requirements for Covered Volunteers. Covered volunteers must be:

1.) background checked (background check to be updated every 5 years),

2.) **and if**, in the course of their volunteer activities, they are *entrusted with the care or supervision of children* they must also attend safe environment training in addition to the fingerprinting and background check. Safe environment training in this diocese is the *Protecting God’s Children Program*.

If a volunteer is **not** a “covered” volunteer, no background screening or safe environment training of any kind is required. *For example*, a reader or Eucharistic minister who serves only at Mass in a parish church is not a “covered” volunteer. Thus, except for the training associated with reading at Mass or administering the Eucharist, nothing more except the approval of the pastor would be required for such a volunteer.

A covered volunteer who works only with vulnerable adults, and not with children or youth, would have to be fingerprinted and background checked, but would not have to attend a *Protecting God’s Children* class. For example, one who volunteers to help out in a ministry to the elderly or disabled homebound would need to be fingerprinted and background checked, but would not need to attend a *Protecting God’s Children* class.

**“Entrusted with the Care or Supervision of Children” – What Does This Mean?** Remember – if a volunteer is entrusted with the care or supervision of children, he or she must be fingerprinted and background checked, and also attend a *Protecting God’s Children* class.

Merely being in the presence of children, or around children in the course of volunteering does not constitute being “entrusted with the care or supervision of children.” Even occasional, short-term direct contact with children does not mean that a volunteer has been entrusted with their care or supervision. However, periods of long or repeated contact with children could create the perception in a child’s mind that the adult volunteer is in some way “in charge,” even if that volunteer has not been formally “entrusted with the care or supervision of children.” This is especially so in the case of younger children. If there is any doubt about this in a particular case, the doubt should be resolved in favor of considering the adult to be entrusted with the care or supervision of children.

**Specific Requirements.** With this in mind, and desiring to err on the side of safety, the following specific requirements regarding certain covered volunteers will best serve the need to ensure a safe environment for our children:

***Catechists.*** All volunteer catechists in a parish religious education program must be background checked and attend a *Protecting God’s Children* class.

***Chaperones.*** Chaperones, by definition, are entrusted with at least a small level of care or supervision as they carry out an oversight function. Accordingly, anyone who volunteers to



serve as a chaperone for minors for even one parish or school trip, event or function must be background checked, and attend a *Protecting God's Children* class.

***Classroom Volunteers.*** Any volunteer who will be assisting a teacher in a classroom setting must be background checked, and attend a *Protecting God's Children* class. This applies to any classroom setting, including parish religious education classes.

***Sports and Band Volunteers.*** Any volunteer who will be assisting in any capacity in a parish or school sports, band or music program must be background checked, and attend a *Protecting God's Children* class. Examples of such volunteer assistance includes serving as a coach or assistant coach, or a volunteer band leader or music coach or teacher.

***Before or After School Program Volunteers.*** Any volunteer who will be assisting in any capacity in a parish or school-sponsored pre-school or after school program must be background checked, and, if 18 years old or older attend a *Protecting God's Children* class.

***All Other School-Related Volunteers.*** Any volunteer who will be assisting in any other school - related functions or activities not mentioned above, such that the volunteer would be in any mentoring, counselor, instructional or supervisor capacity, or could reasonably appear to a child or youth to be in such a capacity, must be background checked, and attend a *Protecting God's Children* class.

***Volunteers in Any Other Youth-Related Programs or Ministries.*** When none of the preceding six specific categories apply, the following is applicable: Any person who volunteers to assist in any capacity in any parish or diocesan program or ministry which primarily serves or involves minors, such that the volunteer would be in any mentoring, counselor, instructional or supervisor capacity, or could reasonably appear to a child or youth be in such a capacity, must be background checked, and if 18 years old or older, attend a *Protecting God's Children* class. Examples of such ministries or programs include: parish youth programs, vacation bible school programs, altar server training or coordination, "children's church" programs during weekend liturgies, Life Teen or similar programs, or diocesan or parish youth retreat programs of any kind, including confirmation retreats.

**IMPORTANT: See Appendix 9 for State of Florida Requirements which may apply.**

**Record Keeping and Reporting Requirements.** All of the efforts at background checks and education of adults and children would really be largely futile unless reasonably accurate records were kept. We have to keep records for several reasons. First, it's a benefit for the clergy, religious, lay employee or volunteer – it insures that they won't have to unnecessarily repeat these requirements when or if they move from place to place within this diocese or possibly within the dioceses of Florida. Second, it's a way to document that the diocese or parish has a functioning and effective safe environment program in place. And third, we – the diocese and the parishes – are ourselves inspected by an agency of the USCCB; they require that records be kept. What follows, then, is a description of the record keeping system which is required to be maintained by parishes and other institutions in the Diocese of St. Augustine.

## Collecting Data – What Information Needs to Be Kept for Fingerprint & Background Screening, and *Protecting God’s Children* Class Attendance

We have to keep track of the background check screening and *Protecting God’s Children* class attendance of lay employees, clergy and religious (priests, deacons, sisters and brothers), all covered volunteers, and certain students (seminarians, MFP students and permanent deacon formation program students). To do this, the following data needs to be collected and maintained.

**PLEASE NOTE** > For purposes of the diocesan Safe Environment Report Form, which must be completed twice a year, **educators** are defined as teachers and administrators in parish and diocesan schools, and they are accounted for as a separate category. CCD / religious education teachers in parish religious education programs are accounted for as either lay employees (if compensated) or volunteers (if not compensated). The Safe Environment Report Form is provided to your parish, school or agency under separate cover prior to the semi-annual reporting dates.

1. **Full Name:** of lay employee, clergy or religious (priests, deacons, sisters and brothers), volunteer, or student (seminarian, MFP student and permanent deacon formation program student).

2. **Social Security Number:** this is needed because names change, but SSNs are not supposed to change.

3. **Dates that Requirements Are Completed:**

- the date and location that the *Protecting God’s Children* class was attended, and

- the date that a background screening was completed. The background screening must be redone every 5 years, so your system needs to have a mechanism for bringing to your pastor, director, or principal’s attention those volunteers, clergy or employees who need to be re-checked.

4. When applicable – a notation or data field to indicate that a person has moved from, or is no longer active in the parish, school or diocesan agency. People in all categories move in and out of parishes, schools and agencies. A special effort needs to be made to keep your information about volunteers current. Your information needs to be updated at least two times a year.

### Who Needs to Collect and Maintain Data:

1.) Each parish and mission. Mission church statistics should be collected and reported separately. In parishes without parochial schools, but which do operate a child care facility, data regarding child care facility personnel should be collected and reported by the parish.

2.) Each Parochial School. In the case of parishes with parochial schools, the parish and school data should be collected and reported separately.

3.) The Catholic Center, including data from all diocesan agencies at the Providence Center except Catholic Charities agencies

4.) The Diocesan Family Life Center

5.) Catholic High Schools

6.) Deleted

7.) Catholic Charities Offices

8.) The Shrine of Our Lady of La Leche and Mission *Nombre de Dios*

9.) Family Housing Management Office

10.) Marywood Retreat Center

**HOW TO: How to Collect and Maintain the Data:** Any way that is the most convenient for you! Many parishes have set up a spreadsheet or database to collect this data. The data that we need to keep track of is pretty basic and lends itself to setting up a simple spreadsheet or database. Some parishes, schools or diocesan agencies though, may find it just as easy to keep a log or index cards, or a paper system of some sort. ***But whichever method is used, records must be kept!*** Also keep in mind that a spreadsheet and database can be easily and quickly searched or “queried” when looking for a specific person or social security number.

**Transferring from One Ministry, Parish or Agency to Another:** If a person transfers into a parish, school or diocesan ministry from another location in the Diocese of St. Augustine, or from another diocese in the State of Florida, it is the responsibility of the ***new*** parish, school or diocesan agency to contact the **Office of Safe Environment** location and confirm that background checks and safe environment class attendance requirements have been completed. It

is important to get the dates that these requirements were completed, as it is the policy of the Ecclesiastical Province of Miami that background checks must be updated every 5 years.

**PLEASE NOTE > Security of Information:** The data collected, whether kept in a database, spreadsheet, log or any other way is to be treated as **confidential**. It should only be accessed by parish, school or agency personnel charged with keeping the data, those who administer background checks or safe environment training, or those at the Catholic Center charged with oversight of the programs or collection of data for official reporting purposes.

If the former location cannot confirm that the person has a completed background check and has attended safe environment training, it will be the **responsibility of the person** to present clear proof of completion of these requirements. If the person cannot do so he or she may not take part in the ministry or activity until any applicable requirements have been completed.

**Scouting Program, and Military and Civilian Law Enforcement Security Clearances:** Because we do not have access to the underlying data upon which a security clearance is granted by the military and civilian law enforcement agencies, or scouting programs, those clearances do not satisfy the requirements of this diocese for background check screening.

**Reporting Requirement:** The diocese must be able to demonstrate that we are aware of levels of compliance with background checking and safe environment class training – and so the necessity for a report. We will need the parish, school or diocesan agency report to be submitted two times a year. The times of these reports may vary slightly from year to year, depending upon the dates for our diocesan audits set by the USCCB’s audit agents. You will be provided with the current report form and instructions well in advance of the date the reports are due to the diocese.

**F. Maintaining A Safe Environment – Standards of Ethical Conduct.** In addition to all of the above parts of this diocesan program, we strive to create and insure a safe environment by establishing ethical standards. Ethical standards are not necessarily rules and regulations, although some ethical standards do repeat and reinforce such rules. Rather, ethical standards are guidelines for how we should conduct ourselves in various circumstances – how we ought to act, not necessarily how we must act. The *Standards of Ethical Conduct for Clergy and Religious* are at Appendix 1. Because the ethical standards for clergy and religious are broader than the area of concern of the safe environment program, the diocese has developed a shorter version of these ethical standards for lay employees and covered volunteers. The *Standards of Ethical Conduct for Lay Employees and Volunteers* are at Appendix 2.

***PLEASE NOTE*** > It is the responsibility of each member of the clergy, each religious member, and each lay employee or volunteer to read their respective Standards of Ethical Conduct.

Once read, please copy or remove the ***Acknowledgment Page***, and sign that page indicating that these standards have been read. This page should be returned to the Chancellor’s Office in the case of clergy, and to the Bishop’s Delegate for Religious in the case of religious sisters and brothers, and directly to the diocesan HR Office in the case of lay employees.

For covered volunteers the Standards of Ethical Conduct must be made available, either in hard copy or by way of the internet. It is the responsibility of the parish, school or diocesan agency using the covered volunteer to establish a system to insure that covered volunteers have read the ethical standards.

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## Appendix 1

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### **Standards of Ethical Conduct in the Diocese of St. Augustine - for Clergy and Religious**

**Introduction.** The term "church worker" includes clergy, religious, lay ministers and employees, and volunteers in diocesan or parish ministries or programs.

Applicability - Clergy and Religious. The following ethical standards apply to all priests, deacons, religious sisters and brothers incardinated, having a canonical mission, having faculties or exercising a ministry in the Diocese of St. Augustine. Parts of the following Standards of Ethical Conduct also apply to all other church workers, be they lay ministers, lay employees of the diocese or a parish, or volunteers in diocesan or parish programs or ministries.

The primary purpose of these ethical standards is to serve as a guide for more effective ministry and job performance for those to whom they are applicable. They are not intended to inhibit any church workers in carrying out their ministry or jobs, or to limit their accessibility to the faithful.

Also note that these ethical standards don't exist in a vacuum - they presuppose the existence of other laws, policies and procedures, both civil and canonical. Actions already condemned by the moral teachings of the Church, or by civil law are rarely repeated in these ethical standards except when deemed necessary to emphasize their significance or seriousness.

#### **Standards of Conduct Regarding Counseling Activities.**

When clergy, religious, spiritual directors and church workers are involved in counseling activities, they are in a professional relationship with the persons they counsel - as such, they should always be aware that they have considerable personal power because of their ministerial role. Accordingly, they should be particularly aware of the need for healthy physical, emotional, sexual, intellectual and spiritual boundaries. The pastoral and spiritual well-being of those counseled should always be the focus of the relationship.

Priests, deacons, religious, church workers engaged in counseling on behalf of a parish or diocesan ministry, and spiritual directors should be mindful of their level of training and competence and should so advise those who seek their counsel. They should make appropriate referrals to other professionals when this would be in the best interest of the person seeking counseling.

Counseling by all except spiritual directors should be short-term in nature.

If additional counseling appears to be needed after about three counseling sessions, the person counseled should normally be referred to an appropriately qualified professional.

However, this ethical standard is not meant to preclude longer periods of counseling within the context of specific programs with established goals and objectives such as, for example, marriage preparation or Project Rachel post-abortion counseling.

Priests, deacons, religious, church workers engaged in counseling on behalf of a parish or diocesan ministry, and spiritual directors should give careful consideration to the possible consequences of entering into a counseling relationship with a person with whom there is a preexisting business, professional or social relationship. Pre-existing relationships can blur the appropriate boundaries necessary for a counselor-counselee relationship, and can impair the judgment of the counselor or spiritual director. Where this situation is unavoidable, counselors and spiritual director should even more diligently establish and maintain appropriate boundaries.

Counseling and spiritual direction sessions should never be audio-taped or videotaped.

Priests, deacons, religious, church workers engaged in counseling on behalf of a parish or diocesan ministry, and spiritual directors should studiously avoid any inappropriate sexual innuendo in the content of counseling or direction. This is especially so when the subject matter of the counseling or spiritual direction involves some aspect of human sexuality.

Priests, deacons, religious, church workers engaged in counseling on behalf of a parish or diocesan ministry, and spiritual directors assume complete responsibility for establishing and maintaining clear and appropriate boundaries in all counseling-related relationships. If a person being counseled, by word or actions, indicates an unwillingness or inability to abide by appropriate boundaries, it is the responsibility of the counselor or spiritual director to immediately terminate counseling and, if warranted, refer the person being counseled to another professional.

Physical contact beyond a handshake between a priest, deacon, religious, church worker engaged in counseling on behalf of a parish or diocesan ministry, or spiritual director and one being counseled can be misconstrued and should be avoided unless the counselor or spiritual director is certain that the contact is appropriate under the circumstances.

Counseling and spiritual direction sessions should always be conducted at appropriate places and times.

Whenever possible, counseling sessions should be held during regular business hours established by the parish or ministry, and in an office setting. Further, offices in which counseling takes place should be designed to include a window in the door or wall, made of glass or similar material, through which human forms are distinctly visible. Where no such counseling setting is currently available steps should be taken at the earliest possible time to modify existing counseling facilities.

Sessions should never be conducted in the private living quarters of either the priest, deacon, religious, church worker engaged in counseling on behalf of a parish or diocesan ministry, or spiritual director, or the person being counseled.

Sessions should not be conducted at places or times which could cause confusion or generate ambiguity about the nature of the relationship either in the mind of the priest, deacon, religious, church worker engaged in counseling on behalf of a parish or diocesan ministry, spiritual director, the person being counseled, or the church community.

Priests, deacons, religious, church workers engaged in counseling on behalf of a parish or diocesan ministry, or spiritual directors should be careful to observe the ethical standards of any professional associations to which they may be required to belong, to the extent that those ethical standards do not contravene divine law or the moral teachings of the Church.

### **Standards of Conduct in Financial Matters and Regarding Church Property.**

Clergy and religious have an obligation to responsibly manage their own financial affairs as well as church property and resources. Moreover, diocesan priests have a canonical obligation to live simply, while religious priests, sisters and brothers have an obligation to live a life of poverty in accordance with the particular law of their religious institutes.

Clergy who have not taken a vow of poverty share with the People of God the obligation to contribute to the support of the Church. They should set a good example in doing so.

Clergy and religious have an ethical obligation to manage their personal affairs responsibly. Debts and financial obligations which are beyond the means of a minister to repay in a reasonable period of time can result in scandal and inhibit the debtor in performing his or her ministry. Such circumstances should be avoided.

Church workers should be good stewards of any church property or goods over which they exercise supervision. They should treat such property with the care, concern and respect with which they would treat their own private property.

Church workers should avoid commingling their own private funds with church funds, and they should never expend church funds for private or non-church purposes. There should always be a direct and articulable church-related purpose for the expenditure of church funds.

Church workers should never appropriate church property or resources to their own private or non-church uses, or allow others to do so. Occasionally, however, it may be appropriate to allow the use of church property or resources for a civic or social event. This should only be done with the specific approval of the pastor or church official responsible for the property or resources.

Church workers should never solicit from the faithful, directly or indirectly, gifts, loans, money or anything of value for their own private use or purposes.

The preceding ethical standard is not meant to prohibit the acceptance of *bona fide* gifts, or to preclude any genuinely arms-length business or commercial transactions by church workers on the same terms as would be available to the general public. (A gift is not a *bona fide* gift if it is given in response to prompting or suggestion by the church worker.)

### **Standards of Conduct in Dealing with Minors and Vulnerable Adults.**

Church workers have a moral and ethical obligation to use good judgment in dealing with minors and vulnerable adults. Good judgment in this context means that church workers will avoid any

actions which violate personal integrity or abuse the trust bestowed upon them as a result of their positions. It means that the physical and emotional safety and security of minors and vulnerable adults will always be given paramount consideration in church programs and ministries. It means that church workers will always strive to avoid even the appearance of impropriety in such matters.

Definition of a vulnerable adult: A vulnerable adult is a person 18 years or older whose ability to engage in the normal activities of daily living, or to care for him/herself is impaired because of mental, emotional, physical or developmental causes, or from the infirmities of old age. Florida Statutes, Sec. 415.102.

Church workers should avoid physical contact with minors and vulnerable adults beyond what is required by the circumstances. When circumstances do call for physical contact that contact should never go beyond hugs, handshakes or hand-holding.

Any physical contact with minors or vulnerable adults should only occur in circumstances that are in plain view of others, for example, in the same room, from a distance, or by way of window or glass opening.

The emotional comfort of the minor or vulnerable adult, rather than the church worker's habits or modes of expression, should always be the primary consideration when engaging in any physical contact.

Church workers should be conscious of their vulnerability when working alone with minors or vulnerable adults. Accordingly, a team approach to ministries and programs involving these persons is always preferable to the extent possible.

The use of any alcohol or tobacco products by church workers while actively engaged in youth ministry or activity with minors or vulnerable adults is unethical conduct in this diocese.

It is always unethical and usually illegal for church workers to provide, or to knowingly tolerate the provision of, alcohol or tobacco products to minors or vulnerable adults.

Overnight accommodations in rectories or convents should never be provided for minors or vulnerable adults who are unaccompanied by parents or legal guardians, or who are not closely related by blood or marriage to the priest or religious occupants of the rectory or convent.

Church workers should never go on diocesan or parish sponsored outings or overnight trips with unchaperoned minors or vulnerable adults other than their own children, or those who are closely related to them. Additionally, it is inappropriate for an adult to share a bed with a minor or vulnerable adult during any church-sponsored travel or outings.

It is unethical, immoral and potentially illegal for a church worker to show sexually explicit materials of any kind or type, under any circumstances, to minors or vulnerable adults.



It is unethical, immoral and potentially illegal for church workers to discuss sexual experiences, engage in sexual innuendo, or tell sexually oriented jokes with or to minors or vulnerable adults.

It is unethical and immoral for church workers to use sexually explicit language or "curse" words in the presence or hearing of minors or vulnerable adults.

This ethical standard is not meant to prohibit any diocesan or parish authorized educational programs which include discussions of sexuality in the context of catechetical instruction or education in Christian morality.

### **Standards of Conduct Regarding Confidentiality.**

Confidentiality is an important aspect of pastoral care. It is an essential element in establishing a relationship of trust which is so necessary in pastoral care. Though information discussed in the course of counseling and spiritual direction should be held in the strictest confidence possible, confidentiality is not an absolute commitment to silence at all costs.

The provisions of this ethical standard relating to confidentiality do not apply to the sacramental seal of the confessional. Under no circumstances can there ever be any disclosure, direct or indirect, of information received in the course of sacramental confession.

Information obtained in the course of pastoral or spiritual counseling sessions should be treated as confidential unless there are serious professional reasons for treating it otherwise, or unless the requirements of law mandate its disclosure.

Information which is confidential, and for which there is no serious professional reason for disclosure, or legal obligation to disclose, should not be revealed to any other persons for any reason.

If information received in counseling indicates a clear and present danger to the person being counseled or to others, there exists a serious professional reason for disclosure. Under such circumstances only sufficient information necessary to avert the danger and prevent harm should be disclosed to the appropriate persons.

If possible, the person being counseled should first be informed about the intent to disclose information and the potential consequences of such disclosure.

The limits of confidentiality should be discussed with one who seeks counseling at the beginning of any counseling session. Confidentiality of pastoral counseling is enhanced when minimal records of the contents of a counseling session are maintained.

If, in the course of counseling a minor or vulnerable adult, it appears that there is a serious threat to the welfare of that minor or vulnerable adult, and the communication of confidential information to a parent or guardian is essential to the health and welfare of the minor or vulnerable adult, the counselor should:

1. Attempt to obtain the consent (in writing if possible) of the minor or vulnerable adult for a disclosure of specific and limited information.
2. If consent is not given, disclosure should be made, but only of the limited information necessary to protect the health and welfare of the minor or vulnerable adult.
3. Consider consulting with a supervisor or colleague before disclosure of information to a parent or guardian.

### **Standards of Conduct in the Maintenance of a Proper Work Place and Ministry Environment.**

Church workers should ensure that a professional work environment exists in the church community - an environment that is free from physical or psychological intimidation or harassment. Harassment denigrates another's personal dignity, can violate one's privacy, and detracts from the mission of the parish or diocesan agency.

A hostile work and ministry environment can arise from a broad range of physical or verbal behaviors, including, but not limited to:

1. physical or emotional abuse,
2. racial insults or innuendo,
3. derogatory ethnic slurs or comments,
4. the telling of sexually oriented jokes,
5. unwelcome sexual advances or touching, or
6. the display of lewd or offensive materials.

Such a hostile work environment can arise from a single serious incident, or from a pattern of behavior which has the effect of creating a hostile or intimidating environment. The conduct described above is unethical and unacceptable for any church worker.

Sexual harassment is particularly offensive and unacceptable in a work or ministry environment. Sexual harassment is defined as unwelcome sexual advances, unwelcome requests for sexual favors, or any other unwelcome physical or verbal conduct of a sexual nature. It includes making unwelcome statements (written or oral) of a sexual nature to a person, or in a person's presence.

Sexual harassment occurs when the victim of such conduct feels offended, humiliated or intimidated, and a reasonable person having access to all relevant information would also regard the conduct as sexual harassment. Sexual harassment is unethical, immoral and potentially illegal misconduct.

## **Standards of Conduct Regarding Parish and Diocesan Records and Information.**

Appropriate confidentiality should be maintained in creating, storing, accessing and disposing of parish and diocesan records.

Sacramental records should generally be regarded as confidential and should only be made available to the persons referenced therein, or to other church workers with an official need to know.

When compiling and publishing parochial or diocesan statistical information from sacramental records, great care should be taken to preserve the anonymity and privacy of individuals.

Information regarding adoption and legitimacy contained in sacramental records should always remain confidential. The procedures for registering the baptism of adopted children, or issuing baptismal certificates for them, promulgated by the National Conference of Catholic Bishops (now the United States Conference of Catholic Bishops) on October 20, 2000 should be carefully observed. These can be obtained from the chancellor's office.

Only those church workers specifically authorized to access sacramental records should handle requests for access to them or for certificates.

Mailing lists of registered parishioners should never be sold or given to other agencies.

Parish, school and diocesan financial records, including records of donations and contributions, are to be treated as confidential, except as required for diocesan reporting and accountability purposes, and except as access is required by governmental agencies.

Records of individual contributions to a parish, the diocese, or to a ministry of the parish or diocese should be regarded as confidential and should be maintained in strict confidence unless disclosure is required by law, or unless disclosure of such information is requested or authorized by the donor.

## **Personal Well-being.**

Clergy and religious have an ethical obligation to safeguard their own spiritual, physical and emotional health.

Clergy and religious should be aware of warning signs in their lives, and in the lives of their fellow pastoral ministers, that may indicate the development of potential physical, spiritual or emotional problems. They should seek appropriate help for themselves when such warning signs appear, and should privately and confidentially point out such warning signs observed in their fellow clergy and religious as well.

Clergy and religious have an ethical obligation to lead a healthy lifestyle. Immoderate consumption of food and alcohol should be avoided, as such consumption can lead to significant and otherwise preventable health problems.

Clergy and religious are in highly visible positions in the church community and have an ethical duty to set a good example for others. The use of tobacco products is injurious to personal health and possibly to that of others in the vicinity of their use. Their use does not set the good example which is expected, and a good faith effort should be made to cease the use of such products.

### **Conflicts of Interest.**

Conflicts of interest can have a significant negative impact upon the effectiveness of the ministry and the church worker. Church workers should avoid situations that might lead to a conflict of interest. Additionally, even the appearance of a conflict of interest can call into question the integrity of the church worker.

Church workers should disclose all relevant factors that potentially could create a conflict of interest.

Church workers should inform all parties when a real or potential conflict of interest arises. Resolution of conflict of interest situations should protect the person receiving ministerial services.

Church workers should not take advantage of anyone to whom they are providing services in order to further their personal or business interests, or the interests of close members of their families.

When pastoral counseling or spiritual direction are provided to two or more people who have a relationship with each other, the church worker should:

1. clarify with all parties the nature of each relationship;
2. consider any possible conflicts of interest;
3. take appropriate action to eliminate the conflict, and
4. obtain from all parties written consent to continue counseling or spiritual direction.

Conflicts of interest may also arise when a church worker's independent judgment is impaired by prior dealings, by becoming personally involved in a given circumstance, or by becoming an advocate for one person against another. In such situations the church worker should advise the persons concerned that he or she can no longer provide services or counseling. Referral to another church worker or spiritual director is normally appropriate in such cases.

### **Reporting Ethical or Professional Misconduct.**

Church workers have a duty to report illegal, unethical or unprofessional conduct.

Church workers should maintain the highest ethical and professional standards. When there is good reason to believe that illegal or unethical actions have occurred or are occurring, the appropriate diocesan officials and/or civil authorities should be promptly notified.

When uncertainty exists about whether a situation or course of conduct violates these Standards of Ethical Conduct, church workers should consult with the chancery office, others knowledgeable about ethical issues, or their peers. In this consultation great care should be taken to protect the identity and reputation of persons, as canon 220 guarantees every person the natural right to privacy and to a good reputation.

When it appears that a church worker has, in fact, violated these Standards of Ethical Conduct, this should be reported to a supervisor, a next higher authority, or directly to the chancery. The reporting of unethical conduct or illegal activity as indicated above should be done confidentially. In no event should such reports be divulged except to the appropriate civil or diocesan authorities.

**Please sign and return this by mail or fax to the chancellor's office.**  
**Thanks very much for your assistance!**

**ACKNOWLEDGMENT**

I have read the foregoing Standards of Ethical Conduct. I agree that, if I do not understand something in these standards, or I am not sure if something in them applies to me, I will ask the Vicar for Priests, the Vicar for Deacons, or the Bishop's Delegate of Religious, or inquire at the chancellor's office.

\_\_\_\_\_  
Sign Name

\_\_\_\_\_  
Print Name

Fax number: 904-262-9270

Mailing address: Diocese of St. Augustine; ATTN: Chancellor's Office; 11625 Old St.  
Augustine Rd.; Jacksonville, FL 32258

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## Appendix 2

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### **Standards of Ethical Conduct in the Diocese of St. Augustine - for Lay Employees and Volunteers**

#### **Introduction.**

The term "church worker" includes clergy, religious, lay ministers and employees, and volunteers in diocesan or parish ministries or programs.

**Applicability.** The following ethical standards apply to church workers in the Diocese of St. Augustine.

These ethical standards are not intended to inhibit any church workers in carrying out their ministry or jobs, or to limit their accessibility to the faithful. Accordingly, these standards are to be interpreted broadly, and with the understanding that they will require adaptation to various and changing circumstances. These ethical standards presuppose the existence of other laws, policies and procedures, both civil and canonical. Actions already condemned by the law or moral teachings of the Church, or by civil law are rarely repeated in these ethical standards except when deemed necessary to emphasize their significance or seriousness.

The primary purpose of these ethical standards is to serve as a guide for more effective ministry and job performance for those to whom they are applicable. Ultimately, these ethical standards are intended to assist us all in the living out of our diocesan mission statement as we, "strive to know, love and serve God in our world through the grace of Jesus Christ, the love of the Father and the guidance of the Holy Spirit."

#### **Standards of Conduct Regarding Counseling Activities (Applies to those involved in counseling activities of any kind)**

When clergy, religious, spiritual directors and church workers are involved in counseling activities, they are in a professional relationship with the persons they counsel - as such, they should always be aware that they have considerable personal power because of their ministerial role. Accordingly, they should be particularly aware of the need for healthy physical, emotional, sexual, intellectual and spiritual boundaries. The pastoral and spiritual well-being of those counseled should always be the focus of the relationship.

Any church workers engaged in counseling on behalf of a parish or diocesan ministry, and spiritual directors should be mindful of their level of training and competence and should so advise those who seek their counsel. They should make appropriate referrals to other professionals when this would be in the best interest of the person seeking counseling.

Counseling by all except spiritual directors should be short-term in nature. If additional counseling appears to be needed after about three counseling sessions, the person

counseled should normally be referred to an appropriately qualified professional. However, this ethical standard is not meant to preclude longer periods of counseling within the context of specific programs with established goals and objectives such as, for example, marriage preparation or Project Rachel post-abortion counseling.

Any church workers engaged in counseling on behalf of a parish or diocesan ministry, and spiritual directors should give careful consideration to the possible consequences of entering into a counseling relationship with a person with whom there is a pre-existing business, professional or social relationship. Pre-existing relationships can blur the appropriate boundaries necessary for a counselor-counselee relationship, and can impair the judgment of the counselor or spiritual director. Where this situation is unavoidable, counselors and spiritual director should even more diligently establish and maintain appropriate boundaries.

Counseling and spiritual direction sessions should never be audiotaped or videotaped.

Any church workers engaged in counseling on behalf of a parish or diocesan ministry, and spiritual directors should studiously avoid any inappropriate sexual innuendo in the content of counseling or direction. This is especially so when the subject matter of the counseling or spiritual direction involves some aspect of human sexuality.

Any church workers engaged in counseling on behalf of a parish or diocesan ministry, and spiritual directors assume complete responsibility for establishing and maintaining clear and appropriate boundaries in all counseling-related relationships. If a person being counseled, by word or actions, indicates an unwillingness or inability to abide by appropriate boundaries, it is the responsibility of the counselor or spiritual director to immediately terminate counseling and, if warranted, refer the person being counseled to another professional.

Physical contact beyond a handshake between a church worker engaged in counseling on behalf of a parish or diocesan ministry, or spiritual director and one being counseled can be misconstrued and should be avoided unless the counselor or spiritual director is certain that the contact is appropriate under the circumstances.

Counseling and spiritual direction sessions should always be conducted at appropriate places and times.

Whenever possible, counseling sessions should be held during regular business hours established by the parish or ministry, and in an office setting. Further, offices in which counseling takes place should be designed to include a window in the door or wall, made of glass or similar material, through which human forms are distinctly visible. Where no such counseling setting is currently available steps should be taken at the earliest possible time to modify existing counseling facilities.

Sessions should never be conducted in the private living quarters of either the priest, deacon, religious, church worker engaged in counseling on behalf of a parish or diocesan ministry, or spiritual director, or the person being counseled.



Sessions should not be conducted at places or times which could cause confusion or generate ambiguity about the nature of the relationship either in the mind of the church worker engaged in counseling on behalf of a parish or diocesan ministry, spiritual director, the person being counseled, or the church community.

Any church workers engaged in counseling on behalf of a parish or diocesan ministry, or spiritual directors should be careful to observe the ethical standards of any professional associations to which they may be required to belong, to the extent that those ethical standards do not contravene divine law or the moral teachings of the Church.

### **Standards of Conduct in Financial Matters and Regarding Church Property**

Church workers should be good stewards of any church property or goods over which they exercise supervision. They should treat such property with the care, concern and respect with which they would treat their own private property.

Church workers should avoid commingling their own private funds with church funds, and they should never expend church funds for private or non-church purposes. There should always be a direct and articulable church-related purpose for the expenditure of church funds.

Church workers should never appropriate church property or resources to their own private or non-church uses, or allow others to do so. Occasionally, however, it may be appropriate to allow the use of church property or resources for a civic or social event. This should only be done with the specific approval of the pastor or church official responsible for the property or resources.

### **Standards of Conduct in Dealing with Minors and Vulnerable Adults**

Church workers have a moral and ethical obligation to use good judgment in dealing with minors and vulnerable adults. Good judgment in this context means that church workers will avoid any actions which violate personal integrity or abuse the trust bestowed upon them as a result of their positions. It means that the physical and emotional safety and security of minors and vulnerable adults will always be given paramount consideration in church programs and ministries. It means that church workers will always strive to avoid even the appearance of impropriety in such matters.

Definition of a vulnerable adult: A vulnerable adult is a person 18 years or older whose ability to engage in the normal activities of daily living, or to care for him/herself is impaired because of mental, emotional, physical or developmental causes, or from the infirmities of old age. Florida Statutes, Sec. 415.102.

Church workers should avoid physical contact with minors and vulnerable adults beyond what is required by the circumstances. When circumstances do call for physical contact that contact should never go beyond hugs, handshakes or hand-holding.

Any physical contact with minors or vulnerable adults should only occur in circumstances that are in plain view of others, for example, in the same room, from a distance, or by way of window or glass opening.

The emotional comfort of the minor or vulnerable adult, rather than the church worker's habits or modes of expression, should always be the primary consideration when engaging in any physical contact.

Church workers should be conscious of their vulnerability when working alone with minors or vulnerable adults. Accordingly, a team approach to ministries and programs involving these persons is always preferable to the extent possible.

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It is always unethical and usually illegal for church workers to provide, or to knowingly tolerate the provision of, alcohol or tobacco products to minors or vulnerable adults.

Overnight accommodations in rectories or convents should never be provided for minors or vulnerable adults who are unaccompanied by parents or legal guardians, or who are not closely related by blood or marriage to the priest or religious occupants of the rectory or convent.

Church workers should never go on diocesan or parish sponsored outings or overnight trips with unchaperoned minors or vulnerable adults other than their own children, or those who are closely related to them. Additionally, it is inappropriate for an adult to share a bed with a minor or vulnerable adult during any church-sponsored travel or outings.

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It is unethical, immoral and potentially illegal for church workers to discuss sexual experiences, engage in sexual innuendo, or tell sexually oriented jokes with or to minors or vulnerable adults.

It is unethical and immoral for church workers to use sexually explicit language or "curse" words in the presence or hearing of minors or vulnerable adults.

This ethical standard is not meant to prohibit any diocesan or parish authorized educational programs which include discussions of sexuality in the context of catechetical instruction or education in Christian morality.

**ACKNOWLEDGMENT**

I have read the foregoing Standards of Ethical Conduct. I agree that, if I do not understand something in these standards, or I am not sure if something in them applies to me, I will ask my supervisor or inquire at the Human Resources Office or the chancellor's office.

\_\_\_\_\_  
Sign Name

\_\_\_\_\_  
Print Name

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## Appendix 3

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### **How to Report Abuse or Concerns about Possible Abuse and Who Should Report**

**Always report any suspected child abuse immediately – do not delay**

#### **HOW to report:**

- A. **Imminent Danger**. If you suspect that a child is in imminent danger from abuse call 911 immediately.
- B. **State Agency**. To report any type of suspected child abuse call the Florida Department of Children & Families at 800-96ABUSE (800-962-2873).
- C. **Diocesan Reporting**. To report possible child abuse, or any sexual abuse or harassment by any clergy, religious, lay employee or volunteer working in or for a parish, school or diocesan agency, contact the Diocese of St. Augustine's Victim Assistance Coordinator at 904-262-3200, ext. 129, or 800-775-4659, ext. 129.

#### **WHO should report:**

From: *“Policy and Procedural Guidelines Relating to Protection of Children and Vulnerable Adults,”* approved by Bishops of Florida, December 6, 2004

**Obligation to Report Abuse** - *“All Church Personnel\* who know, or have reasonable cause to suspect, that a child or vulnerable adult has been a victim of sexual abuse, shall immediately make any report required by law directly to the Department of Children and Families (DCF). Any mandatory report may be made by calling the toll free statewide abuse or neglect registry at 1-800-96ABUSE, or by calling the local DCF office responsible for receiving such reports. Any verbal report to DCF, which is required by law to be confirmed in writing, shall be confirmed in writing to the local DCF office within forty-eight (48) hours of making the verbal report. The statutory clergy confidentiality privilege, as provided in Section 39.204, F.S., and as described in Section 90.505, F.S., shall apply to all reporting required under this paragraph.”* (emphasis added)

*\*Church Personnel shall include any person who is employed by, or engaged in ministry, or providing service, either directly or indirectly, for the diocese, an agency controlled by the Diocese, or a parish. Church Personnel shall include, but not be limited to, priests, deacons, religious, employees, and any volunteer involved in any diocesan or parish activity.*

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## Appendix 4

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### Summary of Contents of Current *Touching Safety Program* Lesson Plans

**Note 1:** Parents may opt their child out of any lesson.

**Note 2:** All lessons must be preceded by **notice to parents** outlining goals & objectives, and giving parents chance to opt-out (see Note 1); also recommended that copy of lesson plan accompany parental notice.

**Note 3:** “CCC” refers to the “Catechism of the Catholic Church”

#### Primary Grades (grades K, 1, 2)

**LESSON #1:**

A. Context - Scripture (1 Cor. 12:17,23,24); Saint - Maria Goretti; CCC #739

B. Contents -

- Naming “regular” body parts
- Difference between “regular” and “private” body parts; treat private body parts special
- Touching safety rules for private body parts (general, non-specific; say “no” & run away)
- Examples of situations & what to do
- Project - make touching safety “Passport” (cut, paste, draw, color)

**LESSON #2:**

A. Context - Scripture (Col. 2:8); Saint - Nicholas of Myra; CCC #1944

B. Contents -

- Concept of “safe adults” as people who touch only in safe ways
- Examples of safe and unsafe touches
- Concept of “special safe adults” as only few select people who have the right to touch a child’s private body parts, & only for specific purposes
- Completion of touching safety Passport project (teacher to reinforce touching safety rules while children work on passports)

#### Intermediate Grades (grades 3, 4, 5)

**LESSON #1:**

A. Context - Scripture (Rom. 12:2); Saint - Maria Goretti; CCC #704

B. Contents -

- Review “touching” rules (if someone attempts to touch private body parts say “no” & get away; tell “safe adult” what happened, especially if you were told not to tell anyone); discuss danger signals leading up to unsafe touching
- Role-play exercise: situations where child should say words that mean “no” or “stop”
- Teacher makes list of kinds of touching that are uncomfortable from class input
- Practice at least 5 different ways of saying “no”

**LESSON #2:**

A. Context - Scripture (Ruth 2:8); Saint - Nicholas of Myra; CCC #2288

B. Contents -

- Activity: make safe touch poster - make up a slogan for poster & cut out pictures from old magazines that show safe touches
- Exercise: Using formula provided by teacher, each child makes up a 5 line safe touch poem, then a 5 line unsafe touch poem; children share their poems **if** they want to
- Teacher gives definition of “special safe adult” as one who may see or touch child’s private body parts, but only to keep child clean & healthy

### **Middle Grades (grades 6, 7, 8)**

#### **LESSON #1:**

A. Context - Scripture (Gen. 1:27,31); Saint - Maria Goretti; CCC #2319

B. Contents -

- Review & expand “touching” rules (discuss possible “risky” situations w/ adults; raise issue of peer pressure - some things not “cool;” raise “grooming” issues
- Discuss grooming “red flags” (adults who allow child to watch R/X movies; adults who tell dirty jokes, etc.)
- Activity: word puzzle (find touching safety words in puzzle)
- Homework project: Pretend you are reporter interviewing someone - ask question, “What is “safe friend / safe adult;” interview family, friends, classmates; discuss at next class

#### **LESSON #2:**

A. Context - Scripture (Acts 18:9,10); Saint - Nicholas of Myra; CCC #1930

B. Contents -

- Activity: word puzzle (“jumble” puzzle) illustrating concept of boundaries
- Review news interview project from last class (safe friends respect boundaries, honor right to say “no,” & do not engage in reckless / unsafe activities)
- Discuss / review actions which might be part of “grooming” process by unsafe adults

### **High School Grades (grades 9, 10)**

#### **LESSON #1:**

A. Context - Scripture (Rom. 12:2); Saint - Maria Goretti; CCC #364

B. Contents -

- Review & expand “touching” rules (knowing rules helps deal w/ potentially threatening & difficult situations; greater personal freedom also poses risks; remind teens that touching can be positive, negative and confusing)
- Discuss examples of positive, negative & confusing touching
- Discuss ways to say “no” (and “no” always means just that in context of human touch)
- Activity: Alternative 1 - create group “saying no / staying safe” collage; Alternative 2 - create skit on same topic; Alternative 3 - plan a praise & worship service

#### **LESSON #2:**

A. Context - Scripture (Sirach 22:25,26); Saint - Nicholas of Myra; CCC #2287

B. Contents -

- Review concept of appropriate relationships & boundaries (examples & scenarios provided)
- Complete activity alternative selected in Lesson #1

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## Appendix 5

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### Summary of Contents of Current *Children & Youth Personal Safety Program* Lesson Plans

#### Primary Grades (grades 1, 2, 3, 4)

##### LESSON THEME: Keeping Myself Safe

- A. Prayer - “Angel of God, my guardian dear . . . .”
- B. Reference - CCC #336
- C. Objectives - rules for keeping people safe; idea of good touch vs. bad touch; realize we are made in image and likeness of God, therefore respect ourselves and others; OK to say “no” when scared; tell someone when you feel scared or unsafe.
- D. Activities - discuss safety rules like looking both ways to cross a street; draw “smiley face” and “frown face” in response to some actions.
- E. Conclusion - God loves us and wants us to feel safe and happy; he gave us our parents, teachers & friends to help us be safe and happy.

#### Intermediate Grades (grades 5, 6, 7, 8)

##### LESSON THEME: Wise Decisions / Being Prudent

- A. Prayer - As in Lesson Plan
- B. Reference - CCC #1806: the virtue of prudence
- C. Objectives - know how to avoid dangerous / harmful activities; importance of a “buddy” system & how to implement; safety plans; practice assertive body language.
- D. Activities - discuss your own personal safety plan in group; discuss safety plan with parents at home; practice saying “no” in given situations.
- E. Conclusion - Jesus is Truth and he wants us to follow him. Jesus wants us to be happy and safe and he gave us the gifts & tools to make good choices and avoid danger.

#### High School Grades (grades 9, 10, 11, 12)

##### LESSON THEME: The Dignity of the Human Person

- A. Prayer - Psalm 139:1-18 read together
- B. Reference - *recommended* that the instructor read *The Truth and Meaning of Human Sexuality*, by the Pontifical Council for the Family, before presenting this class



C. Objectives - understand our dignity as children of God; understand “virtue” and “vice” from CCC # 1804, including cardinal virtues of prudence, courage, justice and temperance, also including virtue of chastity; practical steps for protecting oneself from sexual abuse; know how to react to threats of abuse.

D. Activities - discuss situations and adults to be avoided and ways to protect yourself; how / when / where to communicate concerns.

**Appendix 6**

**Implementation of Article 12  
of the  
USCCB Charter for the Protection of Children & Youth  
in the Diocese of St. Augustine**

**– Program Choice & Comparisons –**

<b>Program Option &gt;</b>	<b><i>Touching Safety Program</i></b>	<b><i>Children &amp; Youth Personal Safety Program</i></b>
Grade Levels	4 Levels: Primary (grades K - 2), Intermediate (grades 3 - 5), Middle (grades 6 - 8), High School (grades 9 & 10)	3 Levels: Primary (grades 1 - 4), Intermediate (grades 5 - 8), High School (grades 9 - 12)
Lesson Plans per Grade Level	2	1
Frequency of repetition	The appropriate grade level lesson plan should be taught in every other grade. More frequent repetitions may be provided at the discretion of the pastor or principal.	The appropriate grade level lesson plan should be taught in every other grade (1, 3, 5, 7, 9, 11).
Introductory letters to parents	YES - outlining goals & objectives & giving parents opportunity to opt-out (opt-out form included); recommended that copy of lesson plans accompany parental notice letter.	YES - with informational attachments
Scheduling of classes	Classes should <b>not</b> be scheduled separate from or outside of the normal religious ed. or school times.	Classes should <b>not</b> be scheduled separate from or outside of the normal religious ed. or school times.
Make-up classes for absentees	<p><u>Religious Ed. Programs:</u> Teach 1 of the 2 lessons in the Fall, and the other in the Spring. A student who misses both classes will be <u>treated as an opt-out</u> - the student's parents must be provided with a letter and copies of the lesson plans and asked to discuss the matters with their child(ren).</p> <p><u>Schools:</u> Teach each lesson once during the school year. A student who</p>	<p><u>Religious Ed. Programs:</u> Teach once in Fall semester with make-up class in Spring semester. A student who misses both classes will be <u>treated as an opt-out</u> - the student's parents must be provided with a letter and copies of the lesson plans and asked to discuss the matters with their child(ren).</p> <p><u>Schools:</u> Teach once during school year; make-up class optional. A</p>

<b>Program Option &gt;</b>	<b><i>Touching Safety Program</i></b>	<b><i>Children &amp; Youth Personal Safety Program</i></b>
	misses both classes will be <u>treated as an opt-out</u> - the student's parents must be provided with a letter and copies of the lesson plans and asked to discuss the matters with their child(ren).	student who misses the class and any make-up class (if provided) will be <u>treated as an opt-out</u> - the student's parents must be provided with a letter and copies of the lesson plans and asked to discuss the matters with their child(ren).
Opting-out of classes	<p>Parents to be given advance notice of classes and an opt-out form to return if they do not want their children to attend a particular class. <u>Opt-out forms must be kept on file with a specifically designated custodian.</u></p> <p>All parents who opt their children out must be asked by letter to discuss contents of lessons with their child(ren), and provided with a copy of the appropriate lesson plans (if not already provided with introductory notice letter).</p>	No opt-out option / no opt-out forms
Other record keeping	Keep record of when classes taught in schools / religious ed. programs	Keep record of when classes taught in schools / religious ed. Programs

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## Appendix 7

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### *Policy and Procedure Relating to Screening of Church Personnel in the Diocese of St. Augustine*

This policy is available online at, along with other resources at: <http://www.dosafl.com/policies-resources/>

**Appendix 8**

<b>Requirements for LiveScan / Background Check, and <i>Protecting God's Children</i> Class Attendance*</b>				
	<b>Lay Employees</b>	<b>Clergy and Religious</b> (Priests, Deacons, Sister & Brothers)	<b>Covered Volunteers</b> (see Part III of Handbook for an explanation of "covered" volunteer)	<b>Seminarians, MFP Students and Deacon Aspirants</b>
<p><b>*LiveScan (electronic fingerprinting) and Background Check Required for:</b> =====➔</p>	<p>Any lay employee, whether part-time or full-time, in any diocesan agency, parish, or school, or any other entity controlled or operated by the diocese.</p>	<p>All priests, deacons and religious who have faculties for ministry in the diocese, or assignments in the diocese, or who seek to minister in the diocese on a temporary basis for <u>15 days or more in a 12 month period</u>.</p> <p>For one-time events such as baptisms or weddings, &amp; for periods less than <u>16 days in a 12 month period</u>, a <u>current</u> Certificate of Good Standing from the bishop or religious superior is satisfactory.</p>	<p>Any volunteer in any diocesan agency, parish or school, or any other entity controlled or operated by the diocese, who is <u>entrusted with the care or supervision of either minors (those below the age of 18), the disabled or the elderly</u>.</p>	<p>All major or minor seminarians sponsored by the diocese, all MFP students, and all aspirants in the Deacon Formation Program.</p>
<p><b>*Protecting God's Children Class Required for:</b> =====➔</p>	<p>Any lay employee, whether part-time or full-time, in any diocesan agency, parish, or school, or any other entity controlled or operated by the diocese.</p>	<p>All priests, deacons and religious who have faculties for ministry in the diocese, or assignments in the diocese, or who seek to minister in the diocese on a temporary basis for <u>15 days or more in a 12 month period</u>.</p> <p>For one-time events such as baptisms or weddings, &amp; for periods less than <u>16 days in a 12 month period</u>, a <u>current</u> Certificate of Good Standing from the bishop or religious superior is satisfactory.</p>	<p>Any volunteer in any diocesan agency, parish, or school or any other entity controlled or operated by the diocese, who is <u>entrusted with the care or supervision of children or youth</u> (those below the age of 18). (See Part III of Handbook)</p>	<p>All major or minor seminarians sponsored by the diocese, all MFP students, and all aspirants in the Deacon Formation Program.</p>

**\* See Appendix 9 for for State of Florida Requirements**

## Appendix 9

**The following are screening requirements imposed by the State of Florida and are in addition to the DOSA requirements:**

**1. SCHOOLS:**

**All employees or individuals who receive compensation of any kind from the schools, regardless of age, must be listed on the Jessica Lunsford retention list.**

**This would mean that all of the after school care workers must submit to a criminal background check regardless of age.**

**2. SUMMER CAMPS:**

**The State of Florida (DCF) has issued new policies concerning Summer Camps. Because the policy is new and anticipated to change, the DOSA directive regarding compliance can be found on the DOSA website ([www.dosafl.com](http://www.dosafl.com)) under the Safe Environment Tab:**