

HELP SHEET: SAFEGUARDING REQUIREMENTS BY POSITION

The level of Safeguarding screening and training required of volunteers and employees in an organization depend upon the positions they occupy and the nature of their ministry or work. These positions are organized by category in the Safeguarding Records System (SRS). Below is a brief description of the requirements for each category, including the level of screening required and whether the training required involves only online courses or both online courses and live Universal Engagement training. A person who moves from one position to another may require additional screening and/or training. For detailed information on the training assigned to each position, see *Help Sheet: Safeguarding Training by Position*.

The diocese requires that screening and training be renewed every 5 years.

1. Lay Head of/Supervisor/SRA/Coordinator/Trainer

- Includes all lay Heads of Organizations, anyone who supervises another adult, and lay members of a Safeguarding Team (Safeguarding Record Administrators, Safeguarding Coordinators, and Safeguarding Trainers)
- Requires full screening in SRS or under an Independent Screening Agreement
- Training includes both online courses and Universal Engagement training

2. Administrator/Facilities/Security (Non-Supervisory)

- Includes people who do administrative work or who work as facilities staff or security staff but do not either supervise another adult or directly interact with children, youth, or vulnerable adults
- Requires full screening in SRS or under an Independent Screening Agreement
- Training includes only online courses

3. Lay Minister/Teacher/Coach/Counselor

- Anyone whose ministry or job involves directly interacting with children, youth, or vulnerable adults but who do not supervise other adults
- Includes vendors who provide programs for children, youth, or vulnerable adults on behalf of the organization
- Includes people whose job description may fall under category 2, but who, in practice, are often called upon to interact with children, youth, or vulnerable adults
- Requires full screening in SRS or under an Independent Screening Agreement
- Training includes both online courses and Universal Engagement training

4. Licensed Lay Eucharistic Visitor (LEV)

- Includes anyone who has completed the diocesan formation process to serve as a Licensed Lay Eucharistic Visitor (LEV)
- Requires full screening in SRS
- Training includes both online courses and Universal Engagement training

- 5. Licensed Lay Eucharistic Minister (LEM), Daily Office Leader and Proclamation of the Word**
 - Includes anyone who has completed the diocesan formation process to serve as a Licensed Lay Eucharistic Minister (LEM) or Ministry Leader for the Daily Office and/or Proclamation of the Word
 - Requires full screening in SRS
 - Training includes only online courses

- 6. Governance—Vestry, Bishop’s Committee, Board**
 - Includes all decision-makers (as defined in *Safeguarding God’s People: Policies for Safe Ministry with Adults*, Section I.D.), other than the Wardens of a congregation
 - Requires no screening
 - Training includes only online courses

- 7. Warden**
 - Includes Senior Wardens, Junior Wardens, and Bishop’s Wardens
 - Requires full screening in SRS
 - Training includes both online courses and Universal Engagement Training

- 8. Treasurer**
 - Requires full screening in SRS or under an Independent Screening Agreement
 - Training includes only online courses

- 9. Vendor/Contractor (Recurrent, No Direct Interaction)**
 - Includes people contracted to perform services that do not involve working with children and youth or vulnerable adults but who have a regular presence at the organization that may bring them into contact with children or youth
 - Screening as needed (depends upon nature and duration of work)
 - Requires only an online module (a review of EDOT policies) or, with approval of the Safeguarding Office, a specialized policy review appropriate to the position

- 10. Key Holder (Note to SRA: When starting the SRS process, select “Yes” for “Is this screening for recertification?” to avoid full process/screening.)**
 - Includes people who have keys to buildings or spaces where children or youth may be present and under-supervised
 - Requires full screening in SRS
 - Training requires only online courses

- 11. Clergy, Clergy Student, Lay Chaplain, Lay Area Missioner**
 - Safeguarding Office acts as SRA for this category
 - Includes members of the clergy, people who are preparing for ordination, lay persons endorsed by the diocese as lay chaplains, and lay Area Missioners
 - Requires special screening under an Independent Screening Agreement with the diocese
 - Training requires both online courses and Universal Engagement for Clergy training

12. Camp Allen Summer Staff

- For adults, requires full screening under an Independent Screening Agreement
- Training requires both online courses and Universal Engagement training

13. Safeguarding Office Assigned

- Reserved for special situations
- Screening requirements will vary
- Training requirements will vary

14. Add-Ons

In addition to the above categories, there are “*Add-Ons*,” the most important of which are:

- All lay employees and volunteers who serve in staff positions must take an online module on Preventing Sexual Harassment in addition to the online courses otherwise assigned to their position
- All lay volunteers or employees who work with vulnerable adults must take an online module on Pastoral Relationships in addition to the other online courses assigned to their category
- All Safeguarding Trainers must take an online module on Pastoral Relationships in addition to the other online courses assigned to their category