



★ The Episcopal Diocese *of Texas*

SAFEGUARDING POLICIES

The Protection of Children, Youth, and Adults

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★ The Episcopal Diocese of Texas

Office of the Bishop

Dear People of the Diocese of Texas,

The Church is called to be the body of Christ in the world, so our relationships should always strive to manifest God's grace. Our ministry together calls for deeply respecting one another and uniting to prevent abuse, exploitation, or neglect, particularly of the most vulnerable among us. Toward this end, Safeguarding draws healthy boundaries around our interactions and teaches us how to respond when those boundaries have been crossed.

It's a changing world, and we continue to grow as a diocese in our understanding of what it means to provide nurturing and respectful environments for people in all their diversity, whether we gather in person or virtually. One thing is certain; we are called to love as Christ loved us. Through our daily awareness and practice of Safeguarding, we offer communities where people of all ages can know that they are valued and loved. In a world too frequently marred by hatred and division, I can't imagine a more precious gift. I am deeply grateful for your partnership in this holy work.

Faithfully,

+C. Andrew Doyle

The Rt. Rev. C. Andrew Doyle

IX Bishop of Texas

About These Policies

This document is a statement of general expectations of behavior in the Episcopal Diocese of Texas from clergy, lay employees, volunteers, and groups when engaged in ministry with children, youth, and adults. These policies are mandated for all ministries and programs of diocesan congregations, schools, and other organizations of the Episcopal Diocese of Texas.

No policy can foresee every possible circumstance to which it may be applied. Any additions or modifications by local leadership to these policies may be made only with the written approval of the [Safeguarding Minister](#).

Application of These Policies

These policies apply to all congregations, schools, and other organizations that operate under the authority of the Episcopal Diocese of Texas.

Responsibility for Implementation

The heads of congregations, the heads of schools, executive directors, and persons serving in equivalent roles in diocesan organizations are directly responsible to the Bishop for the implementation and administration of the policies and procedures outlined in these *Safeguarding Policies*.

The implementation and administration of these policies and procedures may be delegated to other staff members or volunteers, but *the ultimate responsibility may not be delegated*. Supervision of these administrative processes by the Head of Organization is required to ensure appropriate compliance and confidentiality.

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Definitions

Age Categories

1. A **child** is defined as anyone under the age of 12 years.
2. A **youth** is defined as anyone who is at least 12 years old, but not yet 18 years old, and anyone who is 18 years old or older and still in high school.
3. An **adult** is defined as anyone who is 18 years or older who is not in high school and who is not a vulnerable adult.
4. A **Vulnerable Adult** is defined as anyone who is 18 years or older who has special needs of a physical, age-related, or mental nature.

Abuse

Act or failure to act on the part of a parent, caretaker, or another person in the relationship that results in death, physical, or emotional harm, sexual abuse, or exploitation. Abuse includes **physical abuse** (non-accidental injury intentionally inflicted upon a child, youth, or vulnerable adult), **sexual abuse** (any sexual contact, indecency, or activity of a sexual nature with a minor, or vulnerable adult, unwanted sexual activity with an adult), **emotional abuse** (mental or emotional injury to a child or youth or adult that results in an observable and material impairment in the child's, youth's, or adult's growth, development, or psychological functioning).

Adult

Anyone who is 18 years or older, not in high school, and not a Vulnerable Adult.

Bullying

Behavior that intimidates, humiliates, offends, degrades, or harms another person, whether verbally, psychologically, or physically.

Child

Anyone who is under the age of 12 years.

Clergy in Charge

A member of the clergy who oversees a program for children and youth. In a congregation, this is the head of the congregation unless the head has appointed another clergy staff member as the Clergy in Charge of a program.

Decision Makers

All members of decision-making bodies who have the authority to (i) approve the creation of ministries, programs, congregational activities, or policies involving Pastoral Relationships or ministry to Vulnerable Adults; (ii) appoint or approve persons in a Pastoral Relationship or persons who minister to Vulnerable Adults; or (iii) influence the salary or benefits of employees.

Diocese

The Episcopal Diocese of Texas.

Elder Abuse

An intentional or negligent act by any person that causes harm or a serious risk of harm to an adult over the age of 65. It includes physical abuse; financial fraud, scams and exploitation; caregiver neglect or abandonment; psychological abuse; and sexual abuse (involuntary or nonconsensual sexual conduct that would constitute an offense under Texas law).

Head of Organization

The person who is the canonical head of a congregation or the chief executive officer of an organization, such as a head of school or executive director.

Intake Officer

A person designated by the diocese to receive information regarding an offense for which a member of the clergy may be held accountable under *Title IV of the Constitution and Canons of The Episcopal Church*.

LGBTQ+

An acronym for Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, and others. It refers to people whose sexual orientation differs from the heterosexual majority or whose gender identity or expression vary from their sex assigned at birth. The “+” is an effort to include gender non-binary and other gender identities that do not conform to traditional gender categories. This is an evolving term.

Mandated Reporter

A person who is required by state law to report reasonable suspicions of abuse, neglect, and/or exploitation of vulnerable populations to the appropriate state agency. Under Texas law, all adults are mandatory reporters of suspected abuse or neglect of children or youth.

Missional Communities

A regularly occurring gathering that:

- includes church members and community members
- builds authentic relationships around a shared purpose or passion
- nurtures courage, compassion and connection.

Neglect

The failure to provide for a child's or youth's basic needs and/or medical needs or to take action to protect a child or youth from harm.

Off-Site

Any location other than the facility of the diocese or diocesan organization in which the ministry is based.

Organizations

All institutions authorized by the diocese or its congregations, including fellowships, missional communities, college ministries, schools, camps, retreat centers, and social service organizations.

Overnight

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

Pastoral Relationships

Any relationship

- Between a member of the clergy and any individual to whom the member of the clergy provides or has provided counseling, pastoral care, spiritual direction, or spiritual guidance, or from whom such member of the clergy has received information within the Rite of Reconciliation of a Penitent, or
- Between a lay minister and any person to whom the lay minister is offering prayer, ministry, and/or any person from whom the lay minister has received sensitive, personal, or confidential information in the course of offering ministry.

Peer Abuse

Any bullying or abuse occurring between children, between a child and a youth, or between youth.

Personnel

1. **All members of the clergy** who are engaged in ministry or service, whether stipendiary, non-stipendiary, canonically resident, or licensed in the diocese.
2. **Any adult**, whether an employee, volunteer, or vendor,
 - a. **Who supervises or assists in a program or activity for children or youth**, including (but not limited to):
 - Sunday school teacher or director of Christian education/formation for children or youth
 - Parochial or other Episcopal school teacher, substitute teacher, or office staff
 - Nursery worker
 - Vacation Bible School teacher or staff
 - Youth group leader or assistant
 - Parent volunteer in program for children and youth
 - b. **Whose work routinely gives them access to children or youth** in an organization's programs or activities (other than during worship or fellowship activities in which children and youth are being actively supervised by parents or other adults), including (but not limited to):
 - Regular maintenance or cleaning person who works with or around children or youth
 - Security Guard
 - c. **Who possesses a general key or code access to locked buildings** where children or youth may be present without adequate adult supervision. See also *Section III.B.3.*
3. **Youth who assist** in ministries or programs for children or youth (Youth Helpers).

Programs

Official activities and programs sponsored by the diocese or its organizations. Programs expressly include troops of **Scouting America**, because Scouting America requires troops to be chartered by the organization.

Qualified Adult

A Qualified Adult is an adult who is (i) screened and trained in Safeguarding to work with children and youth, (ii) not a Vulnerable Adult, and (iii) at least two years older than the oldest participant in the program.

Responsible Person

The person designated as being accountable for compliance with this policy for an event or program. Such person must be (i) a Qualified Adult who has been trained and screened under these policies and (ii) physically present during the event.

Sacramental Use

Consecrated or unconsecrated wine used in the setting of Eucharist.

Sexual Exploitation

The development or attempt to develop a sexual relationship between a person in a ministerial position, lay or ordained, and an individual with whom he or she has a pastoral or supervisory relationship. (See Policies for Safe Ministry with Adults.)

Sexual Harassment

A legal term, which protects employees, that includes unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature. (See Policies Prohibiting Sexual Harassment.)

Sexual Misconduct

Any sexual or sexualized activity toward another person in a pastoral relationship, irrespective of age or marital status. This definition includes sexual abuse of a minor (under 18 years of age) as set forth more specifically in these policies.

Supervisor

A person who has oversight responsibilities for a program and/or Personnel in a program. Examples include Heads of Organizations, choir directors, directors of religious education, and the directors of commissioned ministries like the Daughters of the King and the Brotherhood of St. Andrew. The Supervisor may or may not be the Clergy in Charge and/or the Responsible Person.

Title IV

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

Training

An organized activity designed to provide information and/or instructions to strengthen and enhance the recipient's understanding, capacity, and exercise of ministry.

Transgender: An adjective describing a person whose sense of gender identity does not correspond with the gender or sex they were assigned at birth. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Travel

An event for children, youth, or vulnerable adults that involves spending the night in multiple locations over more than two calendar days.

Unwanted Sexual Attention

Sexual behavior, language, or visual material between peers that is undesired by a person.

Vulnerable Adults

Adults who are infirm or diminished in capacity due to age, illness, or disability, including:

- Adults who are ministered to in their homes, care facilities, or hospitals by lay or ordained ministers.
- Adults who are wholly or partially dependent upon one or more persons for emotional, psychological, or physical care or support. Such dependency may be temporary, as in the case of an accident, illness, or birth of a child.
- Adults who by virtue of a crisis, experiences vulnerability leading to dependency on another or lacks agency in a Pastoral Relationship, as in the wake of a death or job loss. Such dependency may be temporary.

Warden

Includes the senior warden, junior warden, or bishop's warden of a congregation.

Youth

Anyone who is at least 12 years old, but not yet 18 years old, and anyone who is 18 years old or older and still in high school.

Youth Helper

A youth who assists Qualified Adults in a program involving children and youth.

THE PROTECTION OF CHILDREN AND YOUTH

I. Creating Safe and Healthy Environments

A. Behavioral Standards for Personnel

These guidelines will help identify and prevent behaviors and interactions which may be used to “groom” children, youth, and their parents, or which may create conditions where abuse by adults or peers can more easily occur. They are not designed or intended to address interactions within families.

1. Personnel will offer a positive role model by treating children and youth with patience and with equal respect and consideration, taking care not to show favoritism.
2. Personnel will conduct any one-to-one talks with children and youth in an open or public place where private conversations are possible but occur in full view of others. A Responsible Person or Supervisor shall be informed in advance about any planned conversations. When such conversation is unplanned, the Responsible Person or Supervisor shall be informed as soon as practical.
3. Personnel are encouraged to offer appropriate displays of affection that respect physical, emotional, and behavioral boundaries, including but not limited to the following examples:
 - High fives and fist bumps
 - Handholding while walking with small children or in prayer
 - Brief touching of shoulders, hands, or arms
 - “Laying on of hands” and/or anointing under appropriate pastoral supervision
 - Brief hugs and arms around shoulders
4. Personnel shall not engage in behaviors that cross physical, emotional, and behavioral boundaries, including but not limited to the following examples:
 - Any unwanted form of physical affection
 - Inappropriate or lengthy embraces
 - Kisses on the mouth
 - Holding children over 3 years old on the lap
 - Touching bottoms, chests, or genital areas other than appropriate diapering and toileting of infants/toddlers
 - Showing affection in isolated areas such as bedrooms, staff-only areas
 - Touching knees or legs, wrestling, or tickling children or youth

- Piggyback rides
- Any type of massage given by a child or youth to an adult
- Any type of massage given by an adult to children or youth
- Snapping bras, giving “wedgies,” or similar touching of underwear
- Comments or compliments (spoken, written or electronic) about physique or body development
- Giving money or gifts to individual children or youth
- Private meals with individual children or youth
- Inappropriate interaction on social media

5. Personnel who develop **private relationships** with children or youth outside of ministry activities (e.g., using youth as babysitters or for yard maintenance) will (i) do so **only with the permission** of parents or guardians and (ii) notify the Supervisor or Responsible Person of the program in which the Personnel and child or youth are involved.
6. Personnel **shall not use, possess, distribute, or be under the influence** of alcohol or illegal drugs, or misuse legal drugs or prescription medications while participating in or assisting with programs or activities specifically for children and youth. See also the diocesan [Alcohol Policy](#).
7. Personnel shall not provide children or youth with non-sacramental alcohol, marijuana, drugs, tobacco products, e-cigarettes, vapes, or pornography. See the diocesan [Alcohol Policy](#).
8. Personnel shall not engage in sexual contact with a child or youth or become romantically involved with a child or youth.
9. Personnel **shall not possess, download, or view any sexually oriented or explicit materials** on the property of the diocese or any organization or in the presence of children and youth (except for materials that are part of an educational program that is pre-authorized by the Head of Organization).
10. Personnel **shall not discuss their own sexual activities**, including dreams and fantasies, or discuss with children or youth their use of sexually oriented or explicit materials such as pornography, videos, or materials.

11. Personnel **shall not sleep in the same bed** or sleeping bag with children or youth unless the Personnel is an immediate family member.
12. Personnel **shall not use physical punishment** in any way for behavior management of children and youth, including spanking, slapping, pinching, or any other physical force. Physical force may only be used to stop behavior that may cause immediate harm to the child or to others.
13. Personnel **shall not use harsh language**, profanity, degrading language or punishment, or any mechanical restraint for behavior management.

B. Sexual Activity Between Children/Youth

Although not all sexual activity between children or youth is abuse, sexual activity of any kind between children or youth is not appropriate in connection with activities sponsored by the diocese or organization, regardless of where it takes place. Personnel must intervene to stop such activity by a child or youth and report it immediately as a policy violation and may need to report it as abuse. (See *Section VII.*)

C. Basic Needs

No one is to be deprived of the basic human needs of food, drinking water, shelter, adequate sleep, access to restrooms, safety, and clothing at any event. Adequate sleep means the opportunity to sleep for at least 7 hours.

Exceptions may be made for programs intended to teach children or youth about poverty, needs, and hunger, such as an intentional fasting program. In these cases, children and youth must agree to participate in writing, 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.

D. First Aid and Medications

At all activities for youth or children, the following rules apply:

1. **First Aid Kit:** An appropriately stocked first aid kit shall be available in an easily accessible location.
2. **Medications:** All medications (prescription and over the counter) belonging to minors shall be given to the Responsible Person, unless otherwise agreed upon by the parents and the Responsible Person. Recommended exceptions include inhalers and epi-pens.

Subject to the above exception, the Responsible Person or the Responsible Person's adult designee shall administer all medications.

3. **Records:** A record must be kept for all medications or first aid given to a participant that includes the name of the person administering the medication or treatment, a description of the medication, dosage, and time of medication/treatment.
4. **Current Certification:** Current certification in First Aid, CPR, and Automated External Defibrillator (AED) is encouraged for persons working with children and youth.

E. Discrimination and Harassment

The Episcopal Diocese of Texas prohibits discrimination or harassment toward any person based on race, color, sex, sexual orientation, gender identity or expression, national origin, age, or disabilities. Personnel must report immediately incidents of discrimination or harassment under the provisions of *Section VII*.

F. Inclusiveness

The diocese promotes communities where all persons feel fully welcome and included.

1. In planning programs and activities, care should be given **not to exclude** persons without a purpose that is closely tied to the program or activity.
2. All spaces and settings for programs, activities, and ministry shall be **physically accessible** to everyone to the extent possible.
3. Reasonable **alternative arrangements** shall be made to address the safety and comfort of persons who express the need or desire for additional privacy in restroom use or other private activities.
 - a. Such persons shall be offered reasonable alternative arrangements such as use of a single-stall restroom, a private area for changing clothes, or a separate changing schedule.
 - b. To the extent possible, any alternative arrangement should be provided in a way that protects the ability to keep confidential the need for privacy, if so desired.
 - c. This provision expressly includes requests made by persons whose gender identity does not conform to traditional gender categories. Such persons should not be required to use a locker room or restroom that conflicts with their gender identity.

d. Safe bathroom/shower facilities are to be provided by gender (or specific times will be assigned for the use of a single facility). Violations of this policy must be reported under the provisions of *Section VII*.

G. Violence and Bullying

1. **Violence.** No one is to strike, hit, or otherwise physically threaten or harm anyone at any time at activities.
2. **Bullying.** Bullying is manifested in various ways: abusive language, offensive name calling, acts or threats of physical abuse, vandalism, theft, or destruction of property. Bullying of any kind, including bullying based on sexual orientation or gender identification or expression, inhibits a person's ability to feel safe in our organizations. Bullying in any form violates a person's sense of worth and immeasurable value to God and will not be tolerated in organizations of the diocese. Personnel must report incidents of bullying under the provisions of *Section VII*.

H. Weapons

1. **General Weapons Policy.** The Episcopal Diocese of Texas does not permit any person, including members of the clergy, staff, students, volunteers, and visitors, to carry a weapon in our churches, congregations, schools, or organizations. This prohibition applies even if the person is licensed to carry a concealed weapon under Texas laws. Law enforcement officers or hired private security personnel are the only exception to this policy. There are three ways to give legal notice that the property is a gun free zone: (1) signs posted at entrances, (2) a printed card or other written communication and (3) oral communications. Notification details can be found here: [Gun Law and Policy](#). Personnel must report violations of this policy under the provisions of *Section VII*.
2. **Specific Weapons Policy Involving Children and Youth.** Children and youth shall not have weapons of any kind, or items which may easily be used as weapons (e.g., pocketknives, machetes, bows and arrows, etc.), at any event or program for children and youth except as expressly permitted in camp programs or other programs with prior approval from the Head of Organization.

I. Alcohol Storage and Restriction

All alcohol, including alcohol for sacramental use, must be stored in an area inaccessible to children and youth. Alcohol may not be served at events designed for children and youth except for sacramental use. (See the diocesan [Alcohol Policy](#))

II. Monitoring and Supervision of Programs

Programs for children and youth must be monitored so that inappropriate behaviors by adults, youth, and other children can be detected and stopped. The following rules apply even when the program takes place offsite. When an organization is chartering a program (like Scouting America) or contracting with other organizations or vendors, the Safeguarding Office should be contacted to discuss monitoring and supervising in its context.

A. Accessibility of Information

The Policies for the Protection of Children and Youth shall be posted in an area where activities for children or youth take place, along with contact information for the Clergy in Charge (if applicable), the Supervisor, the Head of Organization, and (in the case of a congregation) a Warden. Such information shall also be given to all parents and guardians of children and youth involved in the activities.

B. Approval and Tracking of Activities and People with Access

1. No new activities for children and youth shall be developed without written approval of the Head of Organization (or in the case of the diocese, the person in the Bishop's Office who oversees programs for children and youth). Requests for new activities must be in writing so that the Head can ensure that any activity includes adequate adult supervision.
2. An up-to-date list of approved programs for children and youth will be maintained by the organization in the office where such records are kept.
3. An up-to-date list of people with general key or code access to the buildings of the organization will be maintained by the organization in the office where such records are kept.

C. Responsible Person

For every youth or children's event, whether held in person or on a virtual platform, a Responsible Person shall be appointed by the Supervisor. The "on site" requirement is met in an online gathering by being present on the virtual platform.

D. Two Adults Rule

1. Except as provided below in item 2 and in *Section V.B.* (with respect to off-site events and travel), at least **two Qualified Adults who are unrelated** (see *E* below) shall be present at ministry settings and events designed for children or youth, including live ministry events held on virtual platforms. A Qualified Adult is an adult who is (i) screened and trained in Safeguarding to work with children and youth, (ii) not a Vulnerable Adults, and (iii) at least two years older than the oldest participant in the program.
2. Exceptions
 - a. Schools or camps that are accredited or licensed may follow the adult supervision rules established by the accrediting or licensing agency.
 - b. Only one Qualified Adult may be sufficient in a well-monitored, visually accessible program space on the grounds of the diocese or organization, provided that another Qualified Adult can maintain frequent visual contact (such as by frequent random checks of classrooms). Such exception must be described in writing and approved by the Head of Organization and the Supervisor.
 - c. Only one Qualified Adult may be sufficient on a virtual platform, provided that at least one other Qualified Adult has the information necessary to make frequent and random checks of the ministry event or that such event is recorded and the recording kept in a location where it can be viewed by the Supervisor and Head of Organization. Such exception must be described in writing and approved by the Head of Organization and the Supervisor.

E. Unrelated Persons

The Two Adults Rule is not met by two people who are related to each other as immediate family members. An immediate family member is defined as the parent, child, sibling, grandparent, spouse, partner, or co-habitant. Immediate family members whose relationships are created by marriage (in-laws and step-relationships) are also included. Related persons may minister together so long as at least one other unrelated Qualified Adult is present.

F. Vulnerable Adults

Persons who are defined as Vulnerable Adults in Section 1.A.4 of these policies may not serve as a Qualified Adult for purposes of the Two Adults rule. If the inclusion of such a person as a participant or helper in a ministry for children and youth is determined by the Head of Organization to be appropriate, then the Safeguarding Minister must be consulted as to what training and/or additional supervision is required.

G. Unanticipated Circumstances

If unanticipated circumstances result in **an adult Personnel's being alone with children or youth**, that adult shall report those circumstances to the Responsible Person, Supervisor, Clergy in Charge, or Head of Organization as soon as possible. This rule also applies to online interactions on virtual platforms.

H. Ratios

The following adult to child/youth ratios must be observed for in-person events:

1. Schools or camps that are accredited or licensed may observe the adult to child ratio as established by the accrediting or licensing agency.
2. For any other program or activity, the following adult to child ratios must be maintained:
 - **Infants (0-11 mo.):** 1:3 (one adult to three infants)
 - **1-5 years** 1:5 for overnight participants and 1:6 for day participants
 - **6-8 years** 1:6 overnight and 1:8 day
 - **9-14 years** 1:8 overnight and 1:10 day
 - **15-18 years** 1:10 overnight and 1:12 day

I. Release

Programs for infants and children under six years old must have procedures to ensure that children are released only to their parents or to those designated by their parents or guardians.

J. Visibility and Security

Classrooms or other areas used by children or youth **must have windows or a window in the wall or door so that casual monitoring can occur**. At least one window must be **unobstructed by blinds, curtains, drapes, or posters, except during a lock-down drill or an active security threat**. Doors of occupied classrooms or other program spaces must be unlocked during activities, except that doors may be locked from the inside in occupied

classrooms and program spaces when recommended as a security measure by law enforcement or a security audit. Unused rooms should be kept locked or monitored.

K. Private Activities

Each program will follow procedures to ensure the safety of children and youth using restrooms, locker rooms, showers, or baths and during diapering.

1. No adult may shower, bathe, change clothes, or use the toilet in the presence of children or youth. Adults should avoid being alone with a child or youth in a restroom, even when there are multiple stalls.
2. When supervising or assisting private activities such as dressing, showering, or diapering infants or children, **the Qualified Adult will remain in an area observable** by other adults or work in pairs. **Children and youth must be supervised at all times to prevent incidents of Peer Abuse.**
3. Safe restrooms, locker rooms, and shower facilities will be provided by gender (or specific times will be assigned for the use of a single facility). **When children or youth express the need for additional privacy, every effort should be made to provide reasonable alternative arrangements that are appropriate for their safety and wellbeing.** A child or youth may request additional privacy for a variety of reasons, including, for example, past experiences of abuse or bullying, medical issues, or non-conforming gender identity. Such arrangements may include the use of a private area or separate changing or showering schedule, or the use of a single-use restroom. To the extent possible, any alternative arrangement should be provided in a way that keeps confidential the reason for requesting additional privacy. Children and youth should not be required to use a restroom or locker room that conflicts with their gender identity.
4. **Diapering** must be done by a Qualified Adult at diapering stations in proximity to other care providers and not behind closed doors or in isolated places.
5. **Age-Appropriate Restroom Supervision**
 - a. **Age Two through 5th Grade**
 - i. If the restroom is attached to the classroom or activity room and has only one toilet, the child may go alone.
 - ii. If the restrooms are located away from the activity or classroom, follow the “rule of three:” two Personnel (at least one of whom must be a Qualified Adult), or one Qualified Adult and at least one other child or youth, should accompany the child to the restroom. Personnel must check the restroom to see if other adults are present before allowing the child to go in. If the

restrooms are in a public space and the absence of other adults cannot be achieved, Personnel must be especially vigilant about the safety of the child.

- iii. In a single use restroom without a stall for the toilet, a Qualified Adult should stand outside the restroom door while the child uses the toilet. In a restroom with a stall, a Qualified Adult should remain outside the stall. If the child requires assistance in using the toilet in a restroom without a stall, then a Qualified Adult may assist the child while leaving the outside door propped open. If the child requires assistance in using the toilet in a restroom with a stall, the stall door must be propped open while a Qualified Adult is assisting the child. When possible, the outside door should be propped open as well.

b. **Youth in 6th through 12th grades**

- i. Youth may go alone to the restroom if the restroom is adjacent to the classroom or activity room or only a short distance away, but groups of adolescents must always be supervised in the restroom. Supervision includes a Qualified Adult who stand just outside the door of a restroom and verbally make their presence known or Qualified Adults who make frequent and random checks of activity within the restroom.
- ii. If restrooms are located some distance away from the activity or classroom, follow the “rule of three:” two Personnel (at least one of whom must be a Qualified Adult) and one youth, or one Qualified Adult and at least one other youth, should accompany the youth to the restroom.

c. Special needs or extenuating circumstances. When appropriate, a specific policy may be formulated, approved by the Head of Organization and a parent or guardian of the child or youth, and implemented with appropriate monitoring and supervision. If assistance is needed in formulating such a policy, contact the [Safeguarding Minister](#).

L. Virtual Ministry, Social Media, Texting and other Digital Communications

All digital communications must comply with Safeguarding policies. Ministry use of virtual platforms (such as Zoom) and social media is evolving, and protocols should be revisited as technology and platforms change. When questions arise about applying Safeguarding policies to a particular technology or platform, consult with the Safeguarding Minister.

- 1. Implement consistent privacy settings that respect personal boundaries with all participants across all platforms.
 - a. Remember that privacy settings do not ensure confidentiality.

- b. Each organization should develop and publish agreed upon privacy settings that staff and volunteers will use and make that information available to members of the community.
 - c. For virtual meetings or classroom forums, utilize passwords and/or waiting rooms that require the facilitator to admit each participant.
- 2. Be accountable.
 - a. Ministry presence on social media platforms should have more than one adult administrator.
 - b. The Head of Organization and Supervisor should know how social media and virtual platforms are used in ministry. If the ministry involves children or youth, parents must also be informed of the way that social media and virtual platforms are used in the ministry.
 - c. Avoid one-on-one texting with children and youth. Use group chat functions or copy a guardian on texts directed toward an individual child or youth. In contexts when a guardian is unavailable or unsafe, a Qualified Adult may be added as the second adult.
 - d. All virtual meetings or classes involving children, youth, or Vulnerable Adults should be scheduled in advance on a calendar that is shared, together with log-in information and passwords, with the Supervisor and, when applicable, with parents or caregivers.
 - e. Consider recording all events that are held on virtual platforms. Before recording children or minors, obtain parental approval. Disclose any meeting or service that is being recorded.
 - f. Any digital communications or posted material on online groups that raise pastoral concerns or are of a potentially harmful nature (such as bullying, abuse, etc.) must be removed but should be saved and disclosed to the Supervisor and Head of Organization and, as appropriate, with parents or caregivers.
 - g. Obtain parental approval before posting images or recordings of children or youth on social media or websites.
 - h. Any AI-generated images/videos that a reasonable person could interpret as depicting individuals under the age of 18 must comply with all media-use policies that apply to images/videos of minors without parental consent and must be clearly labeled as AI-generated.
 - i. Any inappropriate material posted in online groups must be removed but should be saved by the administrator and reported to the Supervisor to be addressed.
 - j. Frequently review the content and photos posted on social media platforms and websites.
- 3. Social media and texting are rarely appropriate for a sensitive matter that requires pastoral care and attention. In those instances, a face-to-face meeting or phone call is

preferable as it allows for an assessment of tone and demeanor to help evaluate the situation and determine both urgency and appropriateness of a response.

4. In social media groups, ongoing group text threads, and on virtual meeting platforms, create covenants that address:
 - Appropriate and inappropriate language and behavior (sexual, profane, or derogatory language, and any sort of bullying are forbidden)
 - Who may join and/or view a group activity
 - Content that may be posted/published on the site or page
 - How images will be taken and shared
 - Consequences for breaking the covenant, which may include removal from group
 - Mandatory rules for reporting misconduct
5. Consider disabling private chat features on virtual platforms when private conversations are not necessary to the purpose of the gathering.
6. When video chatting or meeting on virtual platforms involving video:
 - Be mindful of appropriate attire and surroundings that are visible to the viewer.
 - One-on-one video chatting or meetings should follow the same Safeguarding guidelines as when meeting in person.
7. Use prudent judgment in the timing of digital communications to maintain appropriate boundaries and avoid the appearance of impropriety.
8. Laws regarding mandated reporting of suspected abuse, exploitation, or neglect of children, youth, elders, and vulnerable adults apply in the virtual world just as they do in the physical world.

M. Teaching Children and Youth to Keep Themselves Safe

The Episcopal Diocese of Texas can also help younger children and youth learn to protect themselves. The “I KNOW!” series is a curriculum designed to equip children and youth to keep themselves safe and can be accessed online at [I KNOW! Curriculum for Children and Youth](https://epicenter.org/for-leaders/ministry-integrity-and-wellness/safeguarding).

III. Prior Parental Approval and Registration, Waiver, and Release Forms

A. Prior Approval by Parent

Prior approval by a parent or guardian is required prior to:

1. A minor's viewing any movie rated "PG-13" or above or participating in any program containing sexually explicit or violent content. Such approval must be in writing.
2. A minor's being photographed or recorded on film, videotape, audiotape, or other electronic media.(See sample [Photo/Recording Release](#))
3. A minor's image or voice being posted online or in any form of social media. Such approval must be in writing. (See sample [Photo/Recording Release](#))
4. A minor's participation in any off-site event. For each off-site or seasonal event, a registration, waiver and release form must be signed by a parent or guardian.
5. A minor's participation in any sexually oriented educational program.

B. Registration, Waiver and Release Forms

A parent or guardian shall complete and sign a registration form and a waiver and release form before a minor may participate in any programs for children or youth. Confidentiality must be preserved with respect to medical and other sensitive information in the forms. Such forms can encompass a program year and must be maintained in a secure location on-site or electronically.

IV. Off-Site Events, Overnight Events, and Travel

A. Prior Approval of Off-Site Events

Prior approval of any off-site event must be given by the head of organization and one of the following: (i) the governing body of the organization, (ii) the executive committee of the governing body, or (iii) in the case of a congregation, a Warden of the congregation. If the Head of Organization is directly supervising the event, then prior approval must also be given by the [Safeguarding Minister](#).

B. Adult Supervision

Except as provided below, at any off-site event for children and youth, there shall be at least two unrelated adults, at least one of whom is age 25 or older.

1. Schools or camps that are accredited or licensed may follow the adult supervision requirements and ratios established by the accrediting or licensing agency.
2. For an off-site event involving travel, at least three unrelated adults shall chaperone the trip, with one being age 25 or older, and the minimum ratios of adults to youth increase as follows:
 - **9-14 years – 1:5**
 - **15-18 years – 1:7**

C. Transporting Children and Youth

1. For off-site events that originate and/or terminate at the facility of the organization, all drivers must be at least 21 years of age and provide proof of insurance and a current driver's license appropriate to the vehicle. The organization must keep this information on-file, along with contact information for each driver. It is recommended, but not required, that drivers have a satisfactory DMV record check to be kept on file by the organization.
2. When transporting children or youth in vehicles, two adults must be in each vehicle, except when multiple vehicles travel in a caravan or when an exception has been authorized in writing by the Safeguarding Minister. A roster of children assigned to drivers must include names and contact numbers for all adults and be provided to all drivers.
3. All drivers and riders must comply with state and local laws, including seat belt and cell phone usage.
4. Parents/guardians are responsible for the transportation and safety of their children or youth to and from the facility of the organization or directly to off-site events that do not originate and terminate at the facility. This responsibility includes the transportation of any other passengers in their vehicle.

D. Additional Rules for Overnight Events

1. In overnight programming, particular consideration must be given to children and youth with disabilities, to LGBTQ+ children and youth, and to other children and youth who are at risk for being excluded or stigmatized. When special accommodations are requested, the preferences of these individuals merit careful consideration and action to provide safety, privacy, and the opportunity to participate without marginalization.
2. When children and youth of different genders are participating in overnight activities, chaperones of different genders must attend. Exceptions may be made after consultation with the Safeguarding Minister.
 - a. Sleeping arrangements must be safe and supervised. No bed, cot, or sleeping bag shall have more than one person sleeping in it (but more than one child or youth may sleep on top of a bed in separate sleeping bags).
 - b. Supervision by two Qualified Adults is required in any space where one or more youth or children are sleeping unless (i) the children or youth are participants in a program that meets the licensing requirements to which it is subject, or (ii) the Safeguarding Minister approves in writing an alternative arrangement.
 - c. It is acceptable for all participants to sleep in the same open area where dressing rooms and bathrooms provide appropriate privacy.
3. Except as provided in *Section II.C.*, participants must have access to three meals per full day, have the opportunity for at least 7 hours of sleep each day, and have some time set aside each day for rest or free time.
4. It is recommended that in the case of a hotel stay,
 - a. There be at least three children or youth per room and consideration be given to the relative age and size of the children or youth,
 - b. Qualified Adults 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 elevator, and
 - c. The Responsible Person assigns the rooms and room occupants.

E. Additional Rules for Travel

1. The Responsible Person shall be at least 25 and be responsible for all aspects of the trip, including carrying out all necessary documentation, contacts, and forms (including medical releases, community covenant, and emergency contacts), itineraries, and cash and/or credit card capacity to address emergencies.

2. It is recommended but not mandatory that one Qualified Adult at least 25 years old holds a current medical certification to manage administration of necessary and permissible medications, first aid, and to triage medical situations to determine if an individual needs a higher level of care.
3. A copy of all documents shall be left with an accountable person at the facility of the organization, and such person should serve as the local emergency contact person for communications between the traveling group and families at home.
4. For additional travel tips, contact the Safeguarding Office.

V. Safeguarding Screening and Training

A. Safeguarding Qualifications

1. **No person who has admitted to the sexual abuse of a child or youth or who is known to have a criminal conviction or civil record of child abuse, may be employed or permitted to volunteer to work with or around children or youth in the diocese.**
2. The Safeguarding Record Systems (SRS) of the diocese will be used to obtain, track, and retain all required documentation for screening and training, except for clergy screening (which is completed through a process outside of SRS) and except as provided in *Section V.B.*
 - Screening and training for lay persons are managed by the Safeguarding Records Administrator (SRA) of the organization in which they serve.
 - Clergy screening is managed by the Bishop's Office, and clergy training is managed by the Safeguarding Office.

For an Overview of Safeguarding Screening and Training, see *Appendix i*.

3. The screening and training for persons who volunteer or are employed in an organization depend upon the position or positions in which they serve. See *Appendix ii, Safeguarding Requirements by Position*.
4. The Safeguarding thresholds for lay persons working with or around children or youth are described below. Any exceptions to these requirements must be approved by the Safeguarding Office.
 - a. No lay volunteer will be allowed to work regularly with or around children or youth until all screening requirements for the volunteer's position(s) have been completed and approved.

- b. No lay employee will be allowed to work with or around children or youth until screening has been completed and approved in SRS or under an Independent Screening Agreement.
- c. For the lay volunteer or employee to be allowed to continue working around children or youth, all screening and training requirements must be completed within 45 days from when they were initiated (see Appendix i).
- d. No person may serve as a Qualified Adult unless all screening and training requirements are currently met. No exception to this rule is permitted without the consent of the Safeguarding Minister.

5. The Safeguarding Thresholds for members of the clergy are found in *Appendix i: Overview of Safeguarding Screening and Training*.

B. Screening and Training Exceptions

- 1. **Parent Volunteers.** Parents who assist no more than six times a year with a program in which their child is enrolled are exempt from Safeguarding screening and training requirements. Such assistance includes providing transportation but does not include serving as a Qualified Adult or in any role that includes supervisory responsibilities or being alone with a single child or youth other than a member of their family.
- 2. **Youth Helpers.** Youth who assist adults in the children and youth ministries of our congregations, schools, and diocesan organizations must always be under the supervision of two Qualified Adults. To assist in children and youth ministries, youth must be screened prior to assisting and be trained every 12 months as set out in Safeguarding Youth Helpers.
- 3. **Independent Screening Agreements.** Schools and certain other organizations and entities may enter into annual Independent Screening Agreements with the Safeguarding Office that allow them to screen employees and/or volunteers outside of SRS, provided that their screening requirements meet or exceed the diocesan requirements. Anyone screened under an Independent Screening Agreement must still satisfy all diocesan Safeguarding training requirements through SRS.
 - a. **Schools:** Schools that enter into an Independent Screening Agreement with the Safeguarding Office must still use SRS for screening volunteers unless the school is (i) not a parish day school, (ii) uses the same screening method for volunteers as for employees, and (iii) has a written annual agreement with the Safeguarding Office to screen volunteers independently.
 - b. **Vendors and Non-Episcopal Partners in Ministry:** When an organization partners with a vendor or non-Episcopal entity to provide services with or around

children and youth or to run a program that involves children and youth, the vendor/non-Episcopal partner must comply with the Safeguarding policies and requirements of the diocese, including screening and training. A vendor or non-Episcopal partner that satisfies the requirements above may enter into an Independent Screening Agreement for Vendor with the Safeguarding Office.

c. **Other Organizations.** Other diocesan organizations with screening procedures for employees and/or volunteers that meet or exceed diocesan requirements, may, at the discretion of the [Safeguarding Minister](#), enter into an Independent Screening Agreement.

4. **Safeguarding Office Approved.** In special circumstances, the Safeguarding Minister may approve in writing specific screening and/or training requirements for individuals.

5. **Tutors and Independent Instructors.**

a. **Tutors or independent instructors under contract with an organization:** If any organization contracts with tutors or independent instructors for their students, the tutoring must occur on the property of the organization, and all Safeguarding policies, including screening and training requirements, apply.

b. **Tutors under contract with parents for onsite tutoring:** If parents contract with an independent tutor and request that the tutor meet with their child or youth at the site of the organization, the tutor must sign and date a letter to the parents that acknowledges the following:

- The tutor is not functioning as staff of the organization.
- The organization will choose an appropriate place (open, easily observed, etc.) for the tutoring to take place but will not exercise supervision or oversight of the tutor and student.
- The tutor has not been screened or trained in Safeguarding God's Children policies.
- The tutor must establish a specific time for tutoring that fits the schedule of the organization and must not change the schedule without notifying the Head of Organization.

The original letter must be retained by the organization and a copy provided to all parties, and the parents must notify the Head of Organization of any changes in the tutoring times and when the tutoring has ended.

c. **Faculty or staff contracting with parents for tutoring at home:** If parents contract with a teacher or other staff member of an organization to tutor their child or youth in the student's home, the parent must sign and date a letter to the organization that acknowledges the following:

- The tutor does not function as faculty or staff when tutoring in the student's home.

- The organization has no supervision or oversight and bears no responsibility for the tutor's actions while tutoring the student.

The original letter must be retained by the organization and a copy provided to all parties.

SAFE MINISTRY WITH ADULTS

I. Standards of Behavior

In addition to the policies for creating a safe environment found in *Section IV*, the following policies govern behavior in Pastoral Relationships and in ministry to Vulnerable Adults.

A. Conduct in Pastoral Relationships and/or Ministry to Vulnerable Adults

1. Examples of **inappropriate conduct** in Pastoral Relationships or when ministering to a Vulnerable Adult include:

a. Physical Contact

- Any form of unwanted affection
- Surprise or sudden touching, or touching or hugging from behind
- Full frontal hugs, bear hugs, or lengthy embraces
- Touching bottoms, chests, or genital areas
- Lying down or sleeping beside another
- Massages
- Patting others on their thigh, knee, or leg
- Tickling or wrestling
- Kisses on the mouth
- Showing affection while in isolated areas

b. Verbal/Electronic Communications

- Comments/compliments that relate to a person's body or appearance, or that could be viewed as sexually suggestive.
- Repeated nonessential communications, e-mails, or texts, especially those that contain personal disclosures or solicitations of an intimate or secret relationship.
- Providing personal access, such as a personal e-mail address or cell phone number, that is not generally available to others.
- Possessing, using, sharing, or referring to any sexually oriented materials, such as magazines or videos, whether it occurs on or off the property of the organization.
- Discussing sexual activities, including dreams and fantasies, or discussing the use of sexually oriented or explicit material.
- Inappropriate interaction on social media.

c. Giving or Receiving Gifts

- Giving gifts other than token gifts that are integral to the ministry.

- Giving money other than money distributed from a monitored discretionary fund or emergency assistance fund.
- Requesting money, personal loans, or gifts.
- Receiving gifts other than token gifts.

d. Other Prohibited Interactions

- Providing Vulnerable Adults with non-sacramental alcohol, marijuana, illegal drugs, cigarettes, e-cigarettes, vapes, or pornography.
- Consuming non-sacramental alcohol or illegal drugs or misusing legal drugs when one is responsible for, or ministering to, a Vulnerable Adult.
- Arriving under the influence of alcohol, illegal drugs, or misusing legal drugs when they are responsible for, or ministering to, a Vulnerable Adult.
- Engaging in illegal behavior or permitting others to engage in illegal behavior.
- Engaging in any illicit or secretive relationship or conduct with a Vulnerable Adult.
- Not reporting any gifts, including token gifts, received from a Vulnerable Adult to a person ministering to the Vulnerable Adult to the Supervisor, or in the case of a head of a congregation, to a Warden.
- Using the Pastoral Relationship or relationship with a Vulnerable Adult to meet one's own needs.
- Any attempt to influence unduly the person who is receiving ministry.
- Agreeing to be named as a beneficiary or to act as an administrator or executor in a will of the person who is receiving ministry.
- Agreeing to be given a Power of Attorney or Healthcare Power of Attorney by someone who is receiving ministry.
- Frequent or private meetings after hours or away from church property.
- Seeking excessive private time.
- Unwillingness to cease otherwise appropriate physical conduct after learning it is unwelcome.

2. Examples of Appropriate Physical Contact in Pastoral Relationships or by persons who minister to Vulnerable Adults when they are welcomed by the recipient include:

- Handshakes
- Brief hugs
- Holding hands during prayer
- “Laying on of hands” and/or anointing in appropriate pastoral contexts
- Pats on the shoulder or back
- Touching hands, arms, shoulders

- Holding hands when a person is ill or upset

If a Person in a Pastoral Relationship or a person ministering to Vulnerable Adults is unsure about whether any type of appropriate touch is welcome, the person should ask permission and wait for a response before making physical contact.

B. Sexual Exploitation Prohibited

1. A **member of the clergy** is prohibited from dating or becoming romantically involved or having sexual contact with

- a) an employee, volunteer, student, or counselee of the member of the clergy or of the same congregation as the member of the clergy,
- b) any person in the same congregation as the member of the clergy, or
- c) a person with whom the member of the clergy has a Pastoral Relationship.

This prohibition does not include a relationship that was established before the member of the clergy was associated with the congregation attended by such person.

2. A **lay person** is prohibited from dating or becoming romantically involved or having sexual contact with anyone with whom that person has a Pastoral Relationship.

3. **Any person who ministers to a Vulnerable Adult** is prohibited from dating, becoming romantically involved or having sexual contact with such Vulnerable Adult.

4. **No person may enter into or attempt to enter into a dating, romantic, or sexual relationship with anyone who is supervised by them or whose salary and/or benefits such person (individually or as a member of a decision-making board or vestry) has the power to influence for so long as such person remains in the supervisory or decision-making relationship.**

5. **No person employed as a staff member in a college ministry of the diocese may enter into or attempt to enter into a dating, romantic, or sexual relationship with a student who participates in the college ministry.**

6. The prohibitions against romantic and sexual relationships in this section include attempting to develop any such relationship, even when the attempt is unsuccessful.

7. Members of the clergy are also subject to the provisions regarding dating and sexual relationships in the diocesan [Clergy Manual](#) and in Title IV of The Episcopal Church.

II. General Policies for Creating Safe Environments

A. Discrimination and Harassment

The Episcopal Diocese of Texas prohibits discrimination or harassment toward any person based on race, color, sex, sexual orientation, gender identity or expression, national origin, age, or disability. Violations of this policy must be reported.

B. Inclusion

The diocese promotes communities where all persons feel fully welcome and included.

1. In planning programs and activities, care should be given **not to exclude** persons without a purpose that is closely tied to the program or activity.
2. All spaces and settings for programs, activities, and ministry shall be **physically accessible** to everyone to the extent possible.
3. Reasonable **alternative arrangements** shall be made to address the safety and comfort of persons who express the need or desire for additional privacy in restroom use or other private activities.
 - a. Such persons shall be offered reasonable alternative arrangements such as use of a single-stall restroom, a private area for changing clothes, or a separate changing schedule.
 - b. To the extent possible, any alternative arrangement should be provided in a way that protects the ability to keep confidential the need for privacy, if so desired.
 - c. This provision expressly includes requests made by persons whose gender identity does not conform to traditional gender categories, such as those who are transgender. Such persons should not be required to use a locker room or restroom that conflicts with their gender identity.
 - d. Safe bathroom/shower facilities are to be provided by gender (or specific times will be assigned for the use of a single facility). Violations of this policy must be reported.

C. Violence and Bullying

1. **Violence.** No one is to strike, hit, or otherwise physically threaten or harm anyone at any time at activities.
2. **Bullying.** Bullying is manifested in various ways: abusive language, offensive name

calling, acts or threats of physical abuse, vandalism, theft, or destruction of property. Bullying of any kind, including bullying based on sexual orientation or gender identification or expression, inhibits a person's ability to feel safe in our organizations. Bullying in any form violates a person's sense of worth and immeasurable value to God and will not be tolerated in organizations of the diocese. Personnel must report incidents of bullying.

D. Weapons

The Episcopal Diocese of Texas does not permit any person, including members of the clergy, staff, students, volunteers, and visitors, to carry a weapon in our churches, congregations, schools, or organizations. This prohibition applies even if the person is licensed to carry a concealed weapon under Texas laws. Law enforcement officers and licensed security personnel are the only exception to this policy. There are three ways to give legal notice that the property is a gun free zone: (1) signs posted at entrances, (2) a printed card or other written communication and (3) oral communications. Notification details can be found here: [Gun Law and Policy](#). Personnel must report violations of this policy.

E. Virtual Ministry, Social Media, Texting and other Digital Communications

All digital communications must comply with Safeguarding policies. Ministry use of virtual platforms (such as Zoom) and social media is evolving, and protocols should be revisited as technology and platforms change. When questions arise about applying Safeguarding policies to a particular technology or platform, consult with the Safeguarding Minister.

- 1. Implement consistent privacy settings** that respect personal boundaries with all participants across all platforms.
 - d. Remember that privacy settings do not ensure confidentiality.
 - e. Each organization should develop and publish agreed upon privacy settings that staff and volunteers will use and make that information available to members of the community.
 - f. For virtual meetings or classroom forums, utilize passwords and/or waiting rooms that require the facilitator to admit each participant.
- 2. Be accountable.**
 - a. Ministry presence on social media platforms should have more than one adult administrator.
 - b. The Head of Organization and Supervisor should know how social media and virtual platforms are used in ministry. If the ministry involves children or youth,

parents must also be informed of the way that social media and virtual platforms are used in the ministry.

- c. Avoid one-on-one texting with children and youth. Use group chat functions or copy a guardian on texts directed toward an individual child or youth. In contexts when a guardian is unavailable or unsafe, a Qualified Adult may be added as the second adult.
- d. All virtual meetings or classes involving children, youth, or Vulnerable Adults should be scheduled in advance on a calendar that is shared, together with log-in information and passwords, with the Supervisor and, when applicable, with parents or caregivers.
- e. Consider recording all events that are held on virtual platforms. Before recording children or minors, obtain parental approval. Disclose the meeting or service is being recorded.
- f. Any digital communications or posted material on online groups that raise pastoral concerns or are of a potentially harmful nature (such as bullying, abuse, etc.) must be removed but should be saved and disclosed to the Supervisor and Head of Organization and, as appropriate, with parents or caregivers.
- g. Obtain parental approval before posting images or recordings of children or youth on social media or websites.
- h. Any AI-generated images/videos that a reasonable person could interpret as depicting individuals under the age of 18 must comply with all media-use policies that apply to images/videos of minors without parental consent and must be clearly labeled as AI-generated.
- i. Any inappropriate material posted in online groups must be removed but should be saved by the administrator and reported to the Supervisor to be addressed.
- j. Frequently review the content and photos posted on social media platforms and websites.

3. **Social media, email, or texting is rarely appropriate for a sensitive matter** that requires pastoral care and attention. In those instances, a face-to-face meeting or phone call is preferable as it allows for an assessment of tone and demeanor to help evaluate the situation and determine both urgency and appropriateness of a response.

4. **In group communication and on virtual meeting platforms**, create covenants that address:

- Appropriate and inappropriate language and behavior (sexual, profane, or derogatory language, and any sort of bullying are forbidden)
- Who may join and/or view a group activity
- Content that may be posted/published on the site or page
- How images will be taken and shared

- Consequences for breaking the covenant, which may include removal from group
- Mandatory rules for reporting misconduct

5. Consider **disabling private chat features** on virtual platforms when private conversations are not necessary to the purpose of the gathering.
6. **When video chatting, or meeting on virtual platforms involving video:**
 - Be mindful of appropriate attire and surroundings that are visible to the viewer.
 - One-on-one video chatting or meetings should follow the same Safeguarding guidelines as when meeting in person. The two adult rule still applies.
7. **Use prudent judgment in the timing of digital communications** to maintain appropriate boundaries and avoid the appearance of impropriety.
8. Laws regarding **mandated reporting of suspected abuse, exploitation, or neglect of children, youth, elders, and vulnerable adults** apply in the virtual world just as they do in the physical world. Report suspected abuse to the [Texas Department of Family and Protective Services](#): 800-252-5400. The rules of reporting found in these policies also apply.

III. Monitoring and Supervising Pastoral Relationships and Ministry to Vulnerable Adults

A. Prior Approval and List of Activities or Programs

Approval of all new activities or programs that involve Pastoral Relationships or ministry to Vulnerable Adults must be obtained from the head of the organization before the activity is to begin. Requests to develop new activities or programs should be submitted in writing. An up-to-date list of persons who have Pastoral Relationships or who are appointed to minister to Vulnerable Adults must be maintained by the organization.

B. Appointing a Responsible Person

For any program or event designed for Vulnerable Adults, whether held in person or on a virtual platform, a Responsible Person shall be appointed by the Supervisor. The “on site” requirement is met in an online gathering by being present on the virtual platform.

C. Creating Safe Space for Pastoral Relationships and/or Ministry to Vulnerable Adults

Ministry involving Pastoral Relationships or Vulnerable Adults must, whenever possible, take place in visible spaces with appropriate furnishings where casual monitoring by others is convenient, such as in areas where other persons are visible or work nearby.

- If the ministry setting is not out in the open, there must be windows or open doors that are unobstructed by blinds, furniture, curtains, or posters so that the space is always subject to casual monitoring.
- It is preferable that the location conveys safety and comfort without the use of couches, loveseats, or other furniture that encourages close seating. For example, chairs positioned at a 45-degree angle from each other create a good area for conversation.
- A sense of privacy can be maintained by arranging the furniture so that persons who provide ministry are always visible, but the person receiving ministry does not feel exposed.
- Artwork should be tasteful and inoffensive.
- If the space has a private entrance, the staff should be informed when it is being used for ministry involving Pastoral Relationships or Vulnerable Adults.
- If meeting virtually using an online platform, any virtual background or any artwork or other materials visible in the background should be tasteful and inoffensive.

D. Avoiding Appearance of Impropriety

Persons in Pastoral Relationships and persons who minister to Vulnerable Adults are required to maintain clear and appropriate boundaries and to avoid even the appearance of impropriety.

- Whenever possible, one-on-one meetings should occur during regularly scheduled hours, by appointment, on the organization's premises, or in other appropriate professional settings when others are present in the building.
- When it is not possible, care should be taken to notify the appropriate person or persons of the time and place of the meeting.
- When meeting virtually using an online platform, the meeting should take place during normal hours of social interaction, and the appropriate person or persons should be notified of the time of the meeting.

E. Visiting Vulnerable Adults

Ministry to Vulnerable Adults often involves visits to hospitals, private homes, and residential

facilities, which calls for particular care and supervision.

1. **When visiting a Vulnerable Adult** outside of the guidelines described above, avoid situations that may compromise the Vulnerable Adult's privacy or appear inappropriate, including:
 - Visiting behind closed bedroom doors
 - Sitting on the bed of the Vulnerable Adult
 - Visiting a Vulnerable Adult while they are not fully clothed
2. **Private Residence:** When visiting a Vulnerable Adult in a private residence, it is recommended to visit in teams of two or more. When only one minister is present, it is recommended that a member of the Vulnerable Adult's household be present (which may include a paid caregiver). If that is impractical or impossible, the minister should notify the Supervisor of such visit in advance and document the time, duration of visit, and the general matters discussed. In the case of a visit from the Head of Organization, it is recommended that a Warden or staff member be notified of the visit in advance.
3. **Residential Facility:** When visiting a Vulnerable Adult in a residential facility, the visitor should inform the facility staff of the visitor's presence. If the visit takes place out of sight of staff, staff should be notified in advance and informed when the meeting is concluded. The door to the Vulnerable Adult's room must remain open during the visit. Visitors should be mindful that LGBTQ+ residents may not feel comfortable expressing their sexual orientation or gender identity in the facility.

F. First Aid and Medications

- Current certification in First Aid, CPR, and Automated External Defibrillator (AED) is strongly encouraged for those who work with Vulnerable Adults.
- A first aid kit, appropriately stocked for the event and participants, shall be available in an easily accessible location for all onsite or offsite events for Vulnerable Adults.
- If a Vulnerable Adult requires assistance with medications of any type, then a record must be kept for all medication or first aid given to a participant. This record 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 Vulnerable Adults requiring assistance with medications shall be given to the Responsible Person, unless otherwise agreed upon.
- Only the Responsible Person, or the Responsible Person's adult designee, shall

administer medications.

G. Off-Site Visits, Events, and Programs for Vulnerable Adults

Off-site programs, trips, and events may present additional challenges for safe and healthy ministry with Vulnerable Adults. The expectations for safe space, as described above, should be observed off-site. In the event of uncertainty about application of this policy, the Responsible Person should contact the Supervisor for guidance. Permission and documentation must be obtained as described below.

1. Prior Approval

Prior approval of any offsite event must be given by the Head of Organization and one of the following: (i) the governing body of the organization, (ii) the executive committee of the governing body, or (iii) in the case of a congregation, a Warden of the congregation. If the Head of Organization is directly supervising the event, then prior approval must also be given by the Safeguarding Minister.

These same prior approvals are required when the site is a private residence, and the event is a cook-out, progressive dinner, etc.

2. Registration, Waivers, Release Forms, and Permission Slips

All signatures required below are to be made by the Vulnerable Adults, or if the Vulnerable Adult is unable to consent due to impairment or lack of agency, then the signature of that person's guardian, spouse, or other trusted family member is required. Digital signatures are acceptable if noted on the form.

- b. All participants shall complete and sign a registration, waiver, and release before participating in any program (these may cover a program year). Confidentiality must be preserved with respect to medical information.
- c. Completed release and waiver forms shall be maintained in a secure location on-site.
- d. Permission slips shall be provided and signed for each event.
- e. Prior permission is required for an individual to be photographed or recorded on film, videotape, audiotape, or other electronic media.

3. Transportation

- a. For events that originate and/or terminate at the organization's facility, all drivers must be at least 21 years of age and provide proof of insurance and a current driver's license. The organization must keep this information on file, along with contact information for each driver. It is recommended but not required that each driver also have satisfactory DMV records' check on file with the organization.

- b. A list of those approved to provide transportation to Vulnerable Adults shall be maintained in the office of the organization.
- c. Anyone being transported must consent to such 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.
- d. All drivers and riders must comply with state and local laws including seat belt and cell phone usage.

IV. Safeguarding Screening and Training

A. Safeguarding Qualifications

1. The **Safeguarding Record Systems (SRS) of the diocese will be used to obtain, track, and retain all required documentation** for screening and training, except for clergy screening (which follows a different process outside of SRS).
 - Screening and training for **lay persons** are managed by the Safeguarding Records Administrator (SRA) of the organization in which they serve.
 - **Clergy** screening is managed by the Bishop's Office, and clergy training is managed by the Safeguarding Office.

For an *Overview of Safeguarding Screening and Training*, see *Appendix*.
2. The **screening and training** for persons who volunteer or are employed in an organization **depend upon the position** or positions in which they serve.
3. The **Safeguarding thresholds for lay persons** to work to serve in a ministry with Vulnerable Adults, or minister in a Pastoral Relationship are described below. Any exceptions to these requirements must be approved by the Safeguarding Office.
 - a. **No volunteer or employee will be allowed to engage in a ministry with Vulnerable Adults or minister in a Pastoral Relationship until all screening requirements for the person's position(s) have been completed and approved in SRS or under an Independent Screening Agreement.**
 - b. For the volunteer or employee to be allowed to **continue working** in the above capacity, the **screening and training requirements must be completed within 45 days** from when they were initiated.
4. **Safeguarding thresholds for members of the clergy** are found in the *Appendix, Overview of Safeguarding Screening and Training*.

B. Screening and Training Exceptions

1. **Independent Screening Agreement.** When an organization partners with a vendor or non-Episcopal entity partners to provide services for Vulnerable Adults or involving Pastoral Relationships, the vendor/non-Episcopal partner must comply with the Safeguarding policies and requirements of the diocese, including screening and training. A vendor or non-Episcopal partner may enter into an annual Independent Screening Agreement for Vendor with the Safeguarding Office that allows employees and volunteers to be screened outside of SRS, provided that their screening requirements meet or exceed diocesan requirements. Anyone screened under an Independent Screening Agreement must still satisfy all Safeguarding training requirements through SRS.
2. **Safeguarding Office Approved.** In special circumstances, the Safeguarding Minister may approve in writing specific screening and/or training requirements for individuals, including professionals or student interns who partner with an organization to provide supervised medical or counseling services.

POLICIES PROHIBITING SEXUAL HARASSMENT

Sexual Harassment Policy for Employees and Supervisors

The Episcopal Diocese of Texas prohibits and will not tolerate sexual harassment of personnel in congregations, schools, and other organizations that operate under the authority of the diocese.

A. Definition

Sexual harassment includes unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature in which:

- submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment or relationship with an organization in the diocese
- submission to or rejection of such conduct by the individual is used as a basis for employment or other decisions affecting that person; or
- such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or abusive working environment.

B. Examples of Sexual Harassment

Examples of unwelcome conduct which may constitute sexual harassment include, but are not limited to, the following:

Physical Conduct

- Sexual touching
- Kissing
- Unwelcome casual hugs
- Massaging necks, shoulders, backs
- Being in someone else's "space,"
- Unwelcome displays of romantic or sexual affection
- Aggressive physical contact or assault
- Leering
- Obscene or vulgar gestures including gestures simulating sexual acts, "shooting the finger," kissing the air toward someone, or licking the lips in a sexually suggestive or provocative manner

Verbal

- Off-color jokes

- Sexual language or references
- Proposition
- Suggestive or insulting sounds
- References of a sexual nature about any person
- Gossip/speculation about a person's sexuality, sexual practices, pregnancy, or virility
- Request for dates
- Remarks about anatomy
- Bragging about sexual conquest
- Inquiries about sexual conduct
- Terms of endearment
- Use of curse words or vulgarity
- Sexual innuendo

Visual and Non-Verbal

- Posters
- Photographs
- Cartoons or drawings, including those that depict nudity, sex acts, provocative poses, etc.
- Texts, email messages, or electronic displays of a sexual nature including inappropriate wallpaper, screensavers, or other graphics
- Possession of pornography or inappropriate materials of a sexual nature on the property of a diocesan organization or on its computers, or the display, duplication, or transmission of pornography or such materials

C. Training and Other Requirements

1. Within 30 days of hire or the beginning of service, the employer must provide a copy of *Policies Prohibiting Sexual Harassment* to the following individuals:
 - Heads of congregations, schools, and other diocesan organizations
 - Supervisors of employees and volunteers
 - Employees
 - Volunteers who function as staff
2. Safeguarding training requirements depend upon the position held by an individual within an organization, as set out in these *Policies*. As part of their Safeguarding training, the individuals listed above are required to take the Specialized Training video course, "Preventing Sexual Harassment in the Workplace," which must be accessed through the Safeguarding Records System of the diocese and repeated every 5 years.

D. Reporting

Any persons who believe they have been the victim of any form of sexual harassment must promptly report it to one or more of the following:

- A supervisor
- Anyone in the supervisory chain
- The head of the congregation, school, or other organization
- A warden of a congregation
- Safeguarding Minister/Canon for Wellness and Care

The Rev. Canon Sarah Gaventa, Canon for Wellness and Care/Safeguarding Minister

sgaventa@epicenter.org or report@epicenter.org

510 Rathervue Pl., Austin, TX 78705

512.609.1876 or 800.947.0580

Secure Fax: 866.241.7050

The Rev. Canon Christine Faulstich, Canon to the Ordinary

cfaulstich@epicenter.org or report@epicenter.org

1225 Texas Ave. Houston, TX 77002

713.520.6444 or 800.318.4452

Secure Fax: 713.521.2218

The Rev. Kurt Unangst, Intake Officer

revkurt@stmaryscypress.org

Phone: 346.478.0414

Complaints of sexual harassment may be submitted by phone, email, letter, fax, or in-person. For assistance regarding what information to include in the report, see [Recording Misconduct Resources](#).

All supervisors and decision-makers (as defined in *Safeguarding Policies for Safe Ministry with Adults*) are required to report immediately all formal and informal complaints, as well as any suspected or known policy violations, to the head of the congregation, school, or other organization, as well as to the Safeguarding Minister.

An individual may choose to attempt to resolve the situation by speaking directly to the person whose conduct is objectionable, but the individual is never required to do so. Individuals are never required to complain to their own supervisor or within their chain of command but may utilize other reporting options.

E. Investigation

All complaints of sexual harassment will be promptly investigated. Complaints will be handled on a confidential basis, except to the extent necessary to conduct a proper

investigation. If the investigation substantiates the complaint, immediate corrective action designed to stop the harassment and prevent its reoccurrence, up to and including termination of employment, will be taken.

F. Retaliation

Persons who in good faith reports sexual harassment or provides information related to a complaint will not as result be retaliated against or adversely treated with respect to terms and conditions of employment. Persons who believe that they have been subjected to retaliation in violation of this policy should report it immediately, following the process outlined above. Persons who are found to have engaged in retaliation will be subject to discipline, up to and including termination.

G. Discrimination and Harassment Policy

The Episcopal Diocese of Texas prohibits discrimination or harassment toward any person based on race, color, sex, sexual orientation, gender identity or expression, national origin, age, or disability. Violations of this policy must be reported, using the guidelines for reporting sexual harassment. All complaints will be promptly investigated, and corrective action designed to stop the harassment or discrimination, will be taken.

REPORTING

A. Suspected Abuse or Neglect of Children or Youth

1. Anyone who has reason to suspect that abuse or neglect of a child or youth has taken place is required to **contact the police or the Texas Department of Family Protective Services within 24 hours** (1-800-252-5400, or online at https://dfps.texas.gov/Contact_Us/report_abuse.asp). The TDFPS does not accept email reports. In case of an emergency, call 911. Failure to report suspected neglect or abuse is a crime. For guidance on making a report, call the number above.
2. **In addition**, anyone who has reason to suspect that **abuse or neglect has taken place within a facility or in connection with a program of an organization** should immediately inform:
 - In the case of the **diocese**, the Safeguarding Minister or Canon to the Ordinary.
 - In the case of **any other organization**, the Responsible Person, Supervisor, Warden (of a congregation), and the Head of Organization.
 - In the case of a **parish day school**, both the head of school and the head of congregation, if the suspected abuse or neglect has taken place in the school.
3. A report does not need to be made to anyone who is the subject of the complaint. **If the Head of Organization is the subject of the complaint**, then the report must be made directly to the Safeguarding Minister or Canon to the Ordinary.
4. Anytime that a **member of the clergy is suspected** of abuse, neglect, and/or exploitation, whether or not within a facility or in connection with a program of an organization, a report must be made to **an Intake Officer**.
5. **The head of an organization who has received a report under this section shall immediately inform** the Safeguarding Minister or Canon to the Ordinary, so that immediate and proper steps may be taken, including determining who should make the report to the Texas Department of Family Protective Services (if it hasn't already been made) and providing appropriate pastoral care for affected persons.

B. Behaviors Inconsistent with Policies for Children and Youth

1. Personnel must report any behaviors they observe that are inconsistent with these *Policies for the Protection of Children and Youth*, but which do not constitute knowledge or suspicion of abuse or neglect. Examples of such inconsistent behaviors include:
 - Seeking private time with children or youth
 - age-appropriate sexual exploration between youth or children
 - taking children or youth on overnight trips without other adults
 - swearing or making suggestive comments to children or youth
 - using staff or volunteers without the Safeguarding screening or training required for their position.
2. Personnel observing inappropriate behaviors shall make a report immediately to the Responsible Person, Program Supervisor, a Warden, or to the Head of Organization. (See [Reporting Misconduct Resources](#) for guidance on the information to include):
 - **Anyone who receives a report shall immediately report the same to the Head of Organization unless the policy violation or inappropriate behavior is directly attributable to the Head of Organization.**
 - **If the policy violation or inappropriate behavior is directly attributable to the Head of Organization**, a report must be made to the Safeguarding Minister or Canon to the Ordinary.
 - In the case of a **parish day school, both the head of school and the head of congregation** must be notified of any policy violation or inappropriate behavior in the school.
 - **If the inappropriate behaviors or policy violations continue** after the Head of Organization has been notified, a report must also be made to the Safeguarding Minister or Canon to the Ordinary.
3. Any **Head of Organization** who receives a report of inappropriate behavior or a policy violation **shall immediately report the same to the** Safeguarding Minister or **Canon to the Ordinary.**

C. Suspected Sexual Exploitation or Abuse, Neglect, or Exploitation of a Vulnerable Adult

1. Anyone who has reason to suspect that **Sexual Exploitation or any abuse, neglect, or exploitation of a Vulnerable Adult has taken place within a facility or program of the diocese or an organization** should immediately inform:

- In the case of the **diocese**, the Safeguarding Minister or Canon to the Ordinary.
- In the case of an organization, the Responsible Person, Supervisor, and Head of Organization. In the case of a parish day school, a report must be made to both the head of school and the head of congregation. A report does not need to be made to anyone who is the subject of the complaint.
- **If the Head of Organization is the subject of the complaint, then the report must be made directly to the Safeguarding Minister or Canon to the Ordinary.**
- Anytime that a **member of the clergy is suspected** of abuse, neglect, and/or exploitation, an **Intake Officer**.

2. In addition, any adult who has reason to suspect that abuse, neglect, or exploitation of an adult with disabilities under Texas law or of an adult who is over 65 has taken place is required to contact the police or the Texas Department of Family Protective Services (1-800-252-5400, or online at https://dfps.texas.gov/Contact_Us/report_abuse.asp). TDFPS does not accept email reports. Under Texas law, all persons are Mandated Reporters. In case of an emergency, call 911.
3. The Head of Organization who has received a report under this section shall immediately inform the Safeguarding Minister or Canon to the Ordinary (see below) so that immediate and proper steps may be taken, including providing appropriate pastoral care for affected persons.
4. In the case of a safeguarding violation in the context of campus ministry, there may be additional reporting requirements to the University. Contact the Safeguarding Minister in this case.

D. Behaviors Inconsistent with Policies for Adults

1. Policy violations that do not rise to the level of Sexual Exploitation or the abuse, neglect or exploitation of a Vulnerable Adult, as defined in these policies, **must first be reported to the Head of Organization** or, in the case of the diocese, to the Safeguarding Minister. If the Head of Organization is the subject of the complaint, the policy violation must be reported to the Safeguarding Minister or Canon to the Ordinary.
2. **If the policy violation continues after a report has been made to the head**, the person must also report such policy violations to the Safeguarding Minister or Canon to the Ordinary.
3. The **Head of Organization** who has knowledge of a policy violation **must inform the Safeguarding Minister or Canon to the Ordinary**.

E. Diocesan Contacts/Intake Officers

The Rev. Canon Sarah Gaventa, Canon for Wellness and Care/Safeguarding Minister
sgaventa@epicenter.org or report@epicenter.org

512.609.1876 or 800.947.0580 Secure Fax: 866.241.7050
510 Rathervue Pl. Austin, TX 78705

The Rev. Canon Christine Faulstich, Canon to the Ordinary
cfaulstich@epicenter.org or report@epicenter.org

713.520.6444 or 800.318.4452 Secure Fax: 713.521.2218
1225 Texas Ave. Houston, TX 77002

The Rev. Kurt Unangst, Intake Officer
revkurt@stmaryscypress.org **Phone: 346.478.0414**

F. Methods for Reporting

Reports may be made by telephone, email, fax, letter, or in person. Reporting misconduct may also be submitted at report@epicenter.org. For assistance with what information to include in the report, see *Reporting Misconduct Resources*.

G. Reporting Protection

No one who reports a violation of these policies will be retaliated against or adversely treated because he or she made a complaint.

H. Investigation and Enforcement

All complaints and reports of inappropriate behavior will be investigated. The diocese may remove from ministry or place on administrative leave any individual who is the subject of a complaint while an investigation is pending. If the investigation substantiates that the complaint is valid, immediate corrective action designed to stop the misconduct and prevent its recurrence will be taken, including dismissal of the offending person.

I. Local Resources for Response

The diocese and each congregation and other organization shall provide a copy of these policies to anyone concerned about circumstances that may violate these policies, along with contact information for:

- Any Responsible Person, Supervisor, Clergy in Charge, Head of Organization

- The Safeguarding Minister, Canon to the Ordinary, and Intake Officers, and
- The Texas Department of Family Protective Services.

APPENDIX

Appendix i

Title IV Accountability and Standards of Conduct for Clergy

Title IV, CANON 3: Of Accountability

Sec. 1. A Member of the Clergy shall be subject to proceedings under this Title for:

- (a) knowingly violating or attempting to violate, directly or through the acts of another person, the Constitution or Canons of the Church or of any Diocese;
- (b) failing without good cause to cooperate with any investigation or proceeding conducted under authority of this Title;
- (c) intentionally and maliciously bringing a false accusation or knowingly providing false testimony or false evidence in any investigation or proceeding under this Title (*added in 2018*);
- (d) intentionally misrepresenting or omitting any material fact in applying for ordination, reception from another church, or nomination as a bishop (*added in 2018*); or
- (e) discharging, demoting or retaliating against anyone who opposes misconduct or reports information regarding an Offense or participates in any Title IV proceeding (IV.3.1),

Sec. 2. A Member of the Clergy shall be accountable for any breach of the Standards of Conduct set forth in Canon IV.4.

Sec. 3. In order for any conduct or condition to be the subject of the provisions of this Title, the Offense complained of must violate applicable provisions of *Canon IV.3* or *IV.4* and must be material and substantial or of clear and weighty importance to the ministry of the Church.

Title IV, CANON 4: Of Standards of Conduct

Sec. 1. In exercising his or her ministry, a Member of the Clergy shall:

- (a) respect and preserve confidences of others except that pastoral, legal or moral obligations of ministry may require disclosure of those confidences other than Privileged Communications;
- (b) conform to the Rubrics of the Book of Common Prayer;
- (c) abide by the promises and vows made when ordained;
- (d) abide by the requirements of any applicable Accord or Order, or any applicable Pastoral Direction, restriction on ministry, or placement on Administrative Leave issued under Canon IV.7;
- (e) safeguard the property and funds of the Church and Community;
- (f) report to the Intake Officer all matters which may constitute an Offense as

defined in *Canon IV.2* meeting the standards of *Canon IV.3.3*, except for matters disclosed to the Member of Clergy as confessor within the Rite of Reconciliation of a Penitent;

(g) exercise his or her ministry in accordance with applicable provisions of the Constitution and Canons of the Church and of the Diocese, ecclesiastical licensure or commission and Community rule or bylaws;

(h) refrain from:

(1) any act of Sexual Misconduct;

(2) holding and teaching publicly or privately, and advisedly, any Doctrine contrary to that held by the Church;

(3) 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;

(4) being absent from the Diocese in which the Member of the Clergy is canonically resident, except as provided in *Canon III.9.3(e)* for more than two years without the consent of the Bishop Diocesan;

(5) any criminal act that reflects adversely on the Member of the Clergy's honesty, trustworthiness or fitness as a minister of the Church;

(6) conduct involving dishonesty, fraud, deceit or misrepresentation; or

(7) 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

(8) any Conduct Unbecoming a Member of the Clergy.

“Sexual Behavior” Any physical contact, speech or other activity sexual in nature or intended to arouse or gratify sexual desires.

“Sexual Misconduct” Sexual abuse (i.e., sexual behavior with a minor), Sexual behavior with a person for whom it is unwelcome or does not consent or by force, intimidation, coercion, or manipulation (*added in 2018*), or Sexual behavior with an employee, volunteer, student, or counselee of the Clergy Member or in the same congregation as the Clergy Member or a person with whom the Clergy Member has a pastoral relationship.

Appendix ii

Overview of Screening and Training General Information

- The Safeguarding Record Systems (SRS) of the diocese must be used to obtain, track, and retain all required documentation for screening and training, except as provided in the policies.
- Screening and training of lay persons are managed by the Safeguarding Records Administrator (SRA) of the organization in which they serve.
- Members of the clergy are screened by a separate process outside of SRS and managed by the Bishop's office in Houston. Clergy training is managed by the Safeguarding Office in Austin.
- The diocese no longer "certifies" people separately in Safeguarding God's Children or Safeguarding God's People. When someone has met the screening and training requirements set out in the policies, such person is "qualified" in Safeguarding.

Who Needs Screening and Training

- Volunteers and employees are screened and trained according to the position or positions in which they serve. See *Safeguarding Requirements by Position*.
- Anyone current in screening and training for a position in one organization of the diocese is generally qualified to serve in the same position in another organization of the diocese without further screening or training.
- Anyone screened and trained in "Safe Church, Safe Communities" in another Episcopal diocese will be evaluated by the Safeguarding Office to determine what screening and additional training will be required.

What Is Involved In Screening?

- Unless an organization has an Independent Screening agreement with the Safeguarding Office, adult screening is performed and tracked through SRS.
- Generally, adult screening initially requires:
 - A personal interview
 - An online application and reference checks
 - A Social Security verification and a nationwide sex offender and criminal history background check in any state where the applicant has resided in the past seven years.
- An initial screening is good for five (5) years. Thereafter, a background check

must be performed every five (5) years for screening to remain current. Generally, personal interviews, applications, and reference checks do not need to be repeated.

- Background checks ordered through SRS are paid for by the diocese.
- Persons under the age of 18 have a separate screening process.

What is Involved in Training?

- At a minimum, training involves watching recorded video courses assigned by the Safeguarding Office and accessed online at Praesidium Academy. See *Help Sheet: Safeguarding Training by Position* Help Sheet.
- In addition, a three (3) hour Live Engagement Training is required for persons who
 - work with or around children,
 - minister to Vulnerable Adults,
 - minister in a Pastoral Relationship,
 - are the Head of Organization,
 - supervise others, OR
 - serve as a Warden in a congregation.

Live Engagement training may be taken either in person or on a streaming platform (i.e. Zoom). Persons must complete all assigned video courses before taking Live Engagement training.

- Training must be renewed every five (5) years, but not all video courses initially assigned will be required for renewal. Live Engagement training, when required, must be taken every five (5) years.
- Screening requirements are tracked separately from training requirements. Thus, a person whose screening is current in SRS does not need rescreening simply because additional training is required to meet Safeguarding qualifications.

Safeguarding Thresholds

- **No person who has admitted to the sexual abuse of a child or youth or who is known to have a criminal conviction or civil record of child abuse, may be employed or permitted to volunteer to work with or around children or youth in the diocese.**
- A lay volunteer must be known by the leadership of the diocese or organization for at least six (6) months before applying for a position that involves working with or around children and youth, ministry with Vulnerable Adults, or Pastoral Relationships. Any exception must be approved by the [Safeguarding Minister](#).

- Before a lay employee or volunteer is allowed to work with or around children or youth, minister to Vulnerable Adults, or minister in a Pastoral Relationship, such person must have completed the Safeguarding screening requirements. They may continue in their work or ministry only if they complete their training within forty-five (45) days. Any exceptions must be approved by the Safeguarding Office.
- In order to serve as a Qualified Adult under the *Policies Protecting Children and Youth*, a lay person must be current in all screening and training requirements.

No member of the clergy (other than a Parent Volunteer) will be allowed to work regularly with or around children or youth until provisionally licensed to work as a member of the clergy in the diocese. For a member of the clergy to continue working with or around children, all screening and training requirements must be completed within 90 days from the start or hire date of the member of the clergy. Persons preparing for ordination are treated as clergy persons.

Appendix iii

Safeguarding by Position

The level of Safeguarding screening and training required of volunteers and employees in an organization depends 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 modules or both online modules 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 laymembers 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 modules and live 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 modules

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 modules and live Universal Engagement training

4. Governance—Vestry, Bishop's Committee, Board

- Includes all decision-makers (as defined in *Policies for Safe Ministry with Adults*), other than the Wardens of a congregation
- Requires no screening
- Training includes only online modules

5. Warden

- Includes Senior Wardens, Junior Wardens, and Bishop's Wardens
- Requires full screening in SRS
- Training includes both online modules and live Universal Engagement Training.

6. Treasurer

- Requires full screening in SRS or under an Independent Screening Agreement
- Training includes only online modules.

7. 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.

8. 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 modules.

9. 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 modules and live Clergy Universal Engagement training

10. Camp Allen Summer Staff

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

11. Safeguarding Office Assigned

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

12. 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 modules otherwise assigned to their position (see *Help Sheet: Safeguarding Training by 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 modules assigned to their category (see *Help Sheet: Safeguarding Training by Position*).
- All Safeguarding Trainers must take an online module on Pastoral Relationships in addition to the other online modules assigned to their category (see *Help Sheet: Safeguarding Training by Position*).

A person who moves from one position into another position may require additional screening and/or training.