

# Handbook for Faith Formation Leaders



*Diocese of  
San Jose*

2017





## Diocese of San Jose

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Office of the Bishop

Dear Catechetical Leaders,

I am happy for this opportunity to tell you how very grateful I am for the good work that you do in helping adults, youth and children come to a deeper faith in Jesus Christ. From the beginning, the Church has depended on the ministry of catechesis to help form people in the ways of faith. As catechetical leaders, you have contributed greatly into making the Diocese of San Jose what it is today. Your dedication and ongoing efforts will be essential for the continued growth and vitality of the Church as we move into the future.

Catechesis is a multi-faceted ministry that demands not only a deep faith and commitment on your part, but also knowledge and skill in many areas. It is my hope that this handbook will assist you in some of the practical aspects of your ministry and enable you to be even more effective in drawing others into an intimate relationship with Jesus Christ.

At this time, I would also like to convey my gratitude to Jeannine Leichner and Wendy Scherbart for their years of dedication to catechetical ministry, both at the parish and the diocesan level. It is through their initiative and leadership that this manual has been made available to you.

Be assured of my prayers as you faithfully sow God's word and God's peace in a world of many challenges.

With every best wish and kind regard, I remain,

Sincerely yours,

Patrick J. McGrath  
Bishop of San Jose

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## **100 Safety and Protection of Children and Youth**

The following guidelines have been developed to assist Faith Formation leaders in carrying out their responsibilities for the safety of the children/youth enrolled in parish Faith Formation programs.

### **101 ATTENDANCE**

Each Faith Formation program should establish attendance policies for the health and safety of the children/youth enrolled. These policies and procedures should be communicated to catechists, parents, and students.

### **102 ARRIVAL AND DISMISSAL**

A plan to protect children/youth as they enter and leave parish grounds on foot, bicycle, car, or other vehicle should be developed by the Faith Formation director/coordinator. This plan should be provided to all families at registration and monitored regularly. Adequate supervision during arrival and dismissal times is essential.

A child/youth who is dropped off and picked up by a parent is the responsibility of the parish from the time they are dropped off until they are picked up. Have the parent/guardian sign the parental consent form at the beginning of the year and designate who may pick up the child. If the person picking up the child is not personally known to the Faith Formation office, identification should be required.

A child/youth who is walking or riding a bicycle is the responsibility of the parish from the time they arrive on parish property until they leave. Note: Children/youth riding bicycles to and from parish grounds are required by law to wear helmets.

### **103 SUPERVISION OF CHILDREN-YOUTH**

We are responsible to assure the safety of children (anyone under the age of 18) who participate in our programs and activities. This means that we need to be sure that these activities are well planned, understood and agreed to by the parents/guardians, and properly supervised. The Faith Formation director/coordinator is responsible for providing continuous and adequate supervision of children/youth during the entire time they are on parish premises or engaged in activities sponsored by the parish Faith Formation program. Volunteer catechists share this responsibility with the director/coordinator. Children/youth are never to be left unsupervised while in your care. Follow the provisions of the Diocese of San Jose Safe Environment Program.

There should always be at least two adults (25 or older). One adult should be of the same gender as the young people and available for on-site and off-site activities. The second adult insures that there is at least one adult present in case of emergency.

The adult-in-charge (supervisor) of the activity should be 25 or older. Supervisors between the ages of 21 and 25 are in charge only with the pastor's permission.

Young adults 19 years and older may act as additional leaders if they have demonstrated the appropriate maturity and objectivity. They are not considered as part of the one to ten/seven ratio.

### **Nursery/Childcare: Adult to child ratio**

An appropriate adult to child ratio should be maintained. Children 18 months and younger should have a one adult to three child ratio and children from 18 months to three years should

have a one adult to four child ratio. Please see the Diocese of San Jose Safe Environment Program for further details.

**At least two volunteers should be present at all times.** Segregate and supervise children by age-group (12 months to 18 months, 18 months to three years, three years to five years, and school-aged). In no event should children be supervised by anyone other than approved staff or volunteers. If a sufficient number of authorized staff or volunteers are not available, the number of children to be cared for must be reduced or the childcare canceled as appropriate. If the parent or guardian is called to care for the child's needs, the parent or guardian must remove the child from the childcare program. Parents/guardians are not permitted in the childcare area for an extended period of time while other children are being supervised. However, they may stop by for a brief time but cannot become a supervisor.

### **Supervision of Youth**

Maintain an 'open door' policy –all interactions between supervisors and youth should be in an area that can be observed by other supervisors.

Private, one-on-one (supervisor-youth) situations are not permitted.

If an activity includes male and female participants, male and female supervisors are required. If the predetermined number of qualified supervisors do not show-up, the event should be canceled.

Supervisors should be reminded to stay in their role as supervisor.

Supervisors must understand and remain within the scope of activities for which parents/guardians have provided informed consent.

### **104 EMERGENCY INFORMATION**

Complete and current emergency information for each child/youth should be kept on file and readily available. Parents should be requested to keep the information current. Emergency information should include the following:

- The name of the child/youth, home address and home telephone number
- Name of person with whom the child lives.
- The business address and cell telephone numbers of the father and the mother or the guardian.
- The name and address of at least two persons authorized to act in the absence of the parents/guardian who may take custody of the child/youth in case of an emergency.
- The name of the primary physician and the dentist, their office addresses and telephone numbers.
- Family Health Plan Carrier, Policy Number
- Specific Medical Information /Conditions, Medications
- Known allergies to medications or other materials, medical dietary restrictions
- Date of last tetanus
- The signature of the responsible parent/guardian with date.

## **105 VISITORS**

All visits by children/youth who are not enrolled in the program must be approved by the Faith Formation Director/Coordinator before the visit. Visitors are also required to bring a completed Visitor Information Form before he or she is permitted to visit a session. See 116 FORMS AND RESOURCES.

## **106 EARLY RELEASE**

A dated written request or an authorization signed by the parent or guardian should be required for a child/youth to leave the Faith Formation program before the usual time of dismissal. Children/youth should only be released to parents, guardians or persons annotated on the child's emergency card. The adult should meet the child in the office of the Faith Formation program and sign him or her out before leaving.

## **107 CUSTODY ARRANGEMENTS**

The Faith Formation Director/Coordinator is expected to cooperate with special custody arrangements of families to the best of his or her ability, but the primary responsibility for seeing that custody arrangements are carried out rests with the parents.

As a matter of policy the Faith Formation Director/Coordinator should have a copy of the decree of dissolution which defines the custody rights of the parents or a copy of any other pertinent legal document. This information should be on file with the emergency cards.

The parents should be informed that the person who drops off the child for Faith Formation sessions should pick up the child. Upon arrival, the parent/guardian or person designated by him or her in writing must bring the child to the office and sign him or her in (date, time, name, and phone). At dismissal time the same parent/guardian or designated person must sign him or her out. **The child should not be released to anyone except the person who has dropped the child off.** Records should be kept of the sign-in/out forms.

In the event that another person appears to take the child, the Faith Formation Director/Coordinator should inform him/her of the arrangements and wait until the proper person comes or call the person who dropped the child off.

Catechists should be informed in writing which children have special dismissal arrangements, what they are, and be asked to cooperate in implementing them.

The pastor should be kept informed about custodial arrangements, established procedures, and any irregularities in cooperating with them.

## **108 CHILD ABUSE**

For the Diocese of San Jose, employed Faith Formation Directors/Coordinators, are "Mandated Reporters" of child abuse and are required by law as "child care custodians" to report suspected child abuse and neglect. Volunteer catechists are considered "Ethical Reporters."

If, in the course of their ministry, a Faith Formation Director/Coordinator reasonably suspects child abuse, he or she must phone Child Protective Services (or 911) as soon as possible and must submit a written report to Child Protective Services (CPS) within 36 hours after the phone call to CPS. A Faith Formation Director/Coordinator who reasonably suspects child abuse should obtain a Child Abuse Report Form (SS8572) and complete it after making the call to CPS. The pastor should be informed as soon as a report has been made and a copy of the report should be sent to the Diocesan Office for the Protection of Children and Vulnerable Adults. If there is a question about whether a particular situation should be reported, the

"mandated reporter" should call CPS for advice. Calls for the purpose of clarification may be anonymous.

The Diocese of San Jose expects that "mandated reporters" take in-service training at least every 3 years.

Volunteer catechists in the Diocese of San Jose are considered "Ethical Reporters," as opposed to employees who are "Mandated Reporters." It is the responsibility of each Ethical Reporter to comply with the diocese's expectations to assist in the protection of youth and vulnerable adults, which requires all volunteers to report any suspicions and/or awareness of abuse to the Director or Coordinator of Faith Formation Ministry, who is then responsible for reporting the incident to the appropriate authorities immediately (or as soon as practically possible within 24 hours). Click [here](#) for information to report sexual misconduct or please contact the Office for the Protection of Children & Vulnerable Adults at 408-983-0113.

### **109 HARASSMENT AND BULLYING**

Any form of harassment or bullying is unacceptable. Parish Faith Formation programs should develop policies to discourage and eliminate such behavior. For a sample harassment and bullying policy which may be adapted for parish use, see 118 FORMS AND RESOURCES.

When a parish harassment and bullying policy is in place, it is the responsibility of the Faith Formation Director/Coordinator to:

1. Implement it through regular meetings with Faith Formation staff and volunteers, ensuring that they understand the policy and its importance.
2. Make parents aware of the policy and the commitment of the Faith Formation staff to its strict enforcement.
3. Make students aware of the meaning of harassment and bullying, the policy, and the commitment of the Faith Formation staff to its strict enforcement.
4. Remain watchful for conditions that create or may lead to a hostile or offensive Faith Formation environment.
5. Establish practices designed to create an environment free from discrimination, intimidation, harassment or bullying.

It should be understood by everyone involved in the Faith Formation program -- staff, volunteers, and students -- that they have the responsibility to:

1. Conduct themselves in a manner which contributes to a positive environment.
2. Avoid any activity that may be considered discriminatory, intimidating, harassing or bullying.
3. Immediately tell anyone who is harassing or bullying him or her that the behavior is offensive and unwelcome.
4. Cease any behavior upon being told that it is perceived as discriminatory, intimidating, harassing, bullying or unwelcome.
5. Report all incidents of discrimination, harassment or bullying to the Faith Formation Director/Coordinator or to the catechist who will inform the Faith Formation Director/Coordinator.

## **110 INFECTIOUS DISEASES**

In the classroom setting, knowing who carries an infectious disease and what germs may be present is not possible. Persons with infections do not always have outward signs and are not always aware of being infected. However, precautions can be taken that will help protect you and others from infectious diseases.

All staff must follow universal precautions which include:

1. Wash your hands with soap and running water at regular times during the day. Common infectious diseases may be contacted from dirt and waste encountered in the workplace.
2. Handle discharges from another person's body (all body fluids) with gloves and wash hands thoroughly with soap and running water when you are finished.
3. Clean surfaces that have blood or body wastes on them with a solution of household bleach and water 1:10. (This solution should be fresh daily to ensure proper strength.)

## **111 DIOCESAN AVIAN INFLUENZA PANDEMIC POLICES AND PROCEDURES**

The World Health Organization (WHO) made this statement in January 2006; "the world is now close to another influenza pandemic that at any time since 1968, when the last of the previous century's three pandemics began". The diocesan pandemic policies and procedures assist in its prevention and respond quickly both organizationally and pastorally in the event of its occurrence. The plan follows the escalating alert stages of a potential pandemic: Pre-pandemic, imminent pandemic, Pandemic period and post-Pandemic. For directives that apply to Faith Formation ministry, see [Pandemic Flu Faith Formation Appendix C](#). See also [Faith Formation Ministry Flu Prevention Requirements](#)

## **112 EMERGENCY CARE**

In cases of accident or sudden sickness, the Faith Formation director, coordinator or his/her delegate is responsible for

- giving appropriate immediate care,
- obtaining emergency care by calling 911 if the condition appears to be serious and
- notifying parents/guardians.

911 should always be called if there is any question about the seriousness of the condition.

## **113 ACCIDENTS / INCIDENTS**

Stay calm and disperse the crowd, if necessary. Remain with the injured person to provide comfort and reassurance. If a criminal act has caused injuries, identify and detain witnesses. Secure the scene.

**If the injury is serious or life threatening dial 911 and be prepared to:**

- State the nature of the emergency.
- State your name and a phone number at your location.
- State the building address and room number or area of the building.
- Remain on the phone until told to hang up.
- Ask someone to meet emergency officials at the street.

**In case of a minor injury or illness:**

- Locate a CPR or First Aid certified person to assist.
- Administer first aid, if indicated. Avoid handling bodily fluids or clothing stained by them.
- If simple first aid is not enough, help to make arrangements with the individual to transport him/her to an urgent care clinic or emergency room for medical treatment.

- Notify the person's parents/guardian/emergency contact of any decision to transport for medical care.
- Report the incident as soon as possible to pastor. Submit any requested documentation immediately.

Accidents /Incidents involving children/youth, catechists, or staff should be recorded on an "Incident Report" form and sent to the Diocesan liability insurance administrator. If the accident/incident appears to be minor, the Director/Coordinator has the option of keeping it on file as documentation. Questions about reporting accidents/incidents should be directed to the Diocesan Business Manager. See an Incident Form in the back of section 100.

#### **114 EMERGENCY PREPAREDNESS**

It is the responsibility of the Faith Formation director/coordinator to develop written plans for fire, earthquake and other emergencies such as lockdowns or bomb threats. These plans should be reviewed annually and revised as needed. Provisions should be made to (a) implement the procedures, (b) to inform parents/guardians, (c) to inform and prepare staff, catechists, aides and other volunteers.

Emergency drills for fire and earthquake should be conducted regularly -- at least once at the beginning of the program and no more than four months later. A record of the date of each drill should be kept.

Standards for a Successful Fire Drill:

- The Fire Alarm can be heard by all staff and children/youth/families
- Designated evacuation routes shall be posted in each room.
- Orderly evacuation begins immediately and is completed within 5 minutes of the initial alarm, with minimal congestion at exit gates.
- Catechists and children/youth/families are staged in an orderly fashion away from fire lanes.
- Catechists have taken roll once in the evacuation area. Any missing children/youth/families are immediately reported to the Director of Faith Formation Ministry /designee.

- Upon sounding of the all clear children/youth/families and staff return to their appropriate classroom and the catechist takes roll once more. Missing children/youth/families are reported to the Faith Formation office.

### Standards for a Successful Earthquake Drill

The following procedures should be practiced in case of an Earthquake.

#### DURING AN EARTHQUAKE IF YOU ARE INSIDE



**DUCK or DROP**  
down on the floor.

Take **COVER** under a sturdy desk, table or other furniture. If that is not possible, seek cover against an interior wall and protect your head and neck with your arms. Avoid danger spots near windows, hanging objects, mirrors or tall furniture.

If you take cover under a sturdy piece of furniture, **HOLD** on to it and be prepared to move with it. Hold the position until the ground stops shaking and it is safe to move. Do not run outdoors.  
Do not use elevators.  
Follow directions of emergency personnel

#### DURING AN EARTHQUAKE IF YOU ARE OUTSIDE

| In a Crowded Hall/Gym:  | In an Elevator:  |
|---|--|
| Stay in your seat and protect your head and neck. Do not rush for the exits. Follow directions of emergency personnel.  | If power fails, elevators will stop and lights will go off. Be patient. Emergency personnel will rescue you as soon as possible. |
| In an Open Area   | In a Vehicle   |
| Move to a clear area if safe to do so. Avoid falling hazards. Duck, cover and hold in an open area. Protect your head and neck. Follow directions of emergency personnel. | Pull over and stop in clear area. Avoid overpasses, power lines and structural hazards. Stay with your vehicle.                  |

## AFTER THE SHAKING STOPS

| If Inside the Parish Building   | If Outdoors On Site  |
|---|--|
| <p>Expect aftershocks over the next hours or days. Check yourself and others for injuries. Report any injuries to the <b>Pastor</b>. Use your training to provide first aid, use fire extinguishers, etc. Assess your surroundings, check for damage and hazardous conditions. Report them to <b>Pastor</b>. Phone systems may be severely impacted. Limit phone use to emergency calls only. <b>DO NOT EVACUATE AUTOMATICALLY.</b></p> <p>Outdoor hazards may be greater than indoor hazards. When safe, follow the <i>parish</i> evacuation procedures. If asked to evacuate to assembly areas, move swiftly. Grab keys, personal items and emergency supplies only if convenient and safe to do so. Follow directions of emergency responders.</p> | <p>Stay clear of buildings, trees or other falling hazard areas. Move to evacuation assembly areas. Follow directions of emergency personnel.</p>  |
|   | When To Go Home  |
|   | <p>In the event of a major earthquake, be prepared to stay on site. You should not try to get home until emergency personnel say it is safe, the streets are cleared for travel and most emergency conditions have been stabilized. The parish is prepared to provide emergency care in accordance with the emergency preparedness plan.</p> |

### 115 FIRST AID KIT

A first aid kit should be available for emergencies. Depending upon the size of the program, either a 16 or 24 unit first aid kit is recommended. A first aid handbook or written instructions for use of the contents should also be included. The contents of a 16 unit first aid kit are listed below:

- 2 units - 1" adhesive compress (Band-Aids)
  - 2 units - 2" bandage compress (4 to a unit)
  - 1 unit - 3" bandage compress (2 to a unit)
  - 1 unit - 4" bandage compress
  - 1 unit - 3"x3" plain gauze pads (4 to a unit)
  - 1 unit - gauze roller bandage
  - 2 units - plain absorbent gauze - ½ sq. yd.
  - 2 units - plain absorbent gauze - 24'x72'
  - 3 units - triangular bandages - 40" (arm sling)
  - 1 unit - tourniquet, scissors, tweezers
- To this add:
- 1 unit - adhesive, non-allergenic tape 2" & 3"
  - 2 units - instant ice packs
- A supply of disposable gloves

An approved cleansing agent should also be included, such as alcohol preps, antiseptic wipes and Benz-chloride wipes. If water is available for rinsing, phisoderm may be used. Kits or replacement units can be purchased at any first aid or medical supply company.

### 116 FIELD TRIPS AND OFF-SITE ACTIVITIES

Field trips must be of Faith Formation value to the learners. They must be planned and carried out as an extension or supplement to the regular Faith Formation program. They must also be authorized in advance by the Faith Formation director/coordinator.

**Criteria for approval.** Criteria for approval of field trips include:

- direct relevance to Faith Formation program for that level
- preparation and follow-up activities
- reasonable and approved expense limits

- safe and proper transportation
- adequate adult supervision
- advance notification to all catechists and parents who are involved
- appropriate length of time

**Permission forms.** No child/youth may go on a field trip or off-site activity unless a completed permission form signed by a parent/guardian has been submitted to the Faith Formation office.

**Verbal permissions given over the phone or in person may never be accepted.** A separate permission forms should be obtained for every field trip or off-site activity.

Field trip permission forms should include the following information:

- |  |   |
|--|---|
| - nature of field trip                       | - mode of transportation to be used                                   |
| - destination and purpose                    | - child's full name   |
| - the date and hours                         | - signature, address, telephone numbers                               |
| - name of supervisor overseeing the activity | (including cell phone) of parent/guardian for emergency use, and date |
| -cost  |   |

See 119 Forms and Resources- Diocesan Student Activity Waiver Form.

**Supervision:** Children/youth on field trips must be adequately and effectively supervised. A staff member or catechist must be present on every field trip.

Chaperons:

1. Chaperons should be at least 25 years old. Chaperons from age 21-24 can be used if there are an adequate amount of older chaperons. Adults ages 18-20 should not be put in a supervisory role with young people. However, these individuals should work with older chaperons to be trained as leaders.
2. Generally, for on-site events, one chaperon should be provided for every 10 high school participants and every 8 middle school participants.
3. Generally, for off-site events, such as overnight retreats and day trips, one chaperon should be provided for every 7 high school participants and every 5 middle school participants.
4. A minimum of 2 chaperons should attend any parish or school sponsored event.
5. Both male and female chaperons should supervise co-ed events and field trips.
6. No chaperon should be alone with a young person at any time (other than a parent with his or her own child). Revised:
7. All interactions between chaperons and a youth should be in an area that can be observed by other chaperons.
8. If the pre-determined number of qualified chaperons do not show up, the event should be cancelled.
9. No alcoholic beverages may be consumed by any chaperon during an off-site event. 10. Adult chaperon participants should fill out and submit a "Waiver and Release" form for any off-site event.

When children/youth travel on a bus, there must be at least one adult supervisor on each bus.

**Student Safety:** State law requires that teachers (and by extension Faith Formation directors/coordinators/catechists) carry first aid kits when taking children/youth on field trips.

Careful provision should be made for the safety of the children/youth.

- a. When children/youth travel on foot, they should be instructed and supervised regarding the

crossing of streets, use of trails, bicycle paths, etc.

- b. The preferred method of transporting children/youth is properly certified common carrier.
- c. Field trip planning should include arrangements for entering and leaving the vehicles to insure safety of the children/youth and to avoid disruption of traffic.
- d. See below for use of private vehicles.
- e. If during any field trip children/youth are given the opportunity to engage in an activity that presents special hazards (e.g. swimming), appropriately certified or trained adults must be available for supervision.

**Student roster and emergency information.** The Faith Formation director/coordinator shall establish procedures for verification of attendance and clearance of children/youth prior to departure on a field trip. A roster of participating children/youth shall be given to the Faith Formation director/coordinator.

The supervising Faith Formation director/coordinator or catechist shall carry a roster of participants including names, addresses, and emergency information. Prohibition of, or clearance for, special activities shall be indicated on this list.

On field trips involving and overnight stay or great distance from home, the Faith Formation director/coordinator should obtain from the parents of each child/youth a special written authorization to obtain emergency medical care in the event of an emergency. These authorizations should be in the possession of the person who is supervising the field trip.

### **Use of private vehicles.**

#### **Key Action Checklist:**

1. Avoid the Risk – Minimize Transportation Services.
2. Use Chartered Transportation Services to Minimize the Risk When Possible.
3. Obtain Signed Permission Slips Anytime Transportation is Provided to Anyone Under 18.
4. Know and Follow Driver Selection Requirements.
5. Restrict the Scope of Vehicle Use.
6. Restrict the Vehicles That May be Used.
7. Know the Rules for Rental Vehicles.
8. Place Children in the Back Seat When Possible.
9. Require the Use of Seatbelts and Vehicle Restraints.
10. Be Prepared for Accidents.

Private vehicles driven by adults may be used. Faith Formation staff members, catechists and other volunteers who use their own vehicles in connection with program activities are ordinarily eligible for secondary coverage under the Diocese's liability insurance.

The Faith Formation director/coordinator should establish criteria to ascertain that children/youth will be transported safely, e.g., in closed vehicles, with a safe passenger load, seat belts for all passengers, etc.

The Faith Formation director/coordinator should have a list of driver/chaperones assisting with the field trip.

Each driver of a private vehicle must:

- have a valid unrestricted (except for corrective lenses) California driver's license and have attached a photocopy to the attached form.
  - be at least 25 years of age and have regularly driven automobiles for the past 5 years.
  - have proof of adequate insurance
  - in the past eight years, the driver **must not have been convicted\*** of any of the following:
    - Any** offense involving alcohol or drugs (e.g. DUI/Drugs, open container, etc.)
    - Negligent, Careless, or Reckless Driving
    - Evading a peace officer
    - Speed contest or exhibition of speed
    - Hit and Run
    - Speeding more than 20 mph over posted limit
    - Failure to stop at a stop sign or signal
    - Any felony charge involving a motor vehicle
    - Driving with a suspended or revoked license
    - Driving on the wrong side of the road
- In the past four years, the driver must **not** have been convicted\* of more than one moving violation
- \* **Convicted includes all convictions and/or related traffic school attendances.**

-Drivers should complete a Driver Information Form– See Resources and Forms to confirm compliance with the foregoing.

No driver may drive alone with any one youth (unless it is the youth's parent/guardian).

### **Vehicle**

The vehicle must have a valid and current registration, license plates and meet state safety requirements. The vehicle must be insured for the minimum of \$100,000/\$300,000/\$50,000. It may not have more than 9 passengers including the driver. 15 passenger vans cannot be used for transporting people. One seat belt must be provided for and used by each vehicle occupant. When renting vehicles, it is necessary to purchase the vehicle insurance through the rental agency. No one should ride in the bed of pick-up trucks. Do not allow volunteers to drive diocesan vehicles. Only designated employees should be allowed to drive diocesan vehicles.

Note: This policy applies only in cases where the parish or school organizes transportation. If participants are responsible for their own transportation, the above does not apply.

**Overnight field trips.** There are additional requirements for overnight field trips which include contacting the Diocesan student accident insurance carrier to determine that the proposed parish-sponsored trip is covered by the student accident insurance policy.

The Faith Formation director/coordinator shall give special care to supervision of overnight lodging. If the group of students includes both boys and girls, both men and women over 21 years of age shall be included as supervisors.

See the Loss Control Bulletin (8-31-94) concerning Youth Group Activities and Field Trips

Loss Control Bulletin (8-31-94)

## **THE ORDINARY MUTUAL A Risk Retention Group Corporation**

### **YOUTH GROUP ACTIVITIES AND FIELD TRIPS**

Prevention of insurance losses is important to the diocese, parish, and its people. First, the pain, suffering, and inconvenience that may accompany accidents are reduced. Second, minimizing losses acts directly to helping to reduce insurance premiums. **Every extra dollar paid in premiums due to preventable losses is a dollar unavailable to provide resources to your parish programs.**

The following recommendations are intended to, along with your good sense, help prevent losses in parish or school youth activities.

#### **I. SUPERVISION**

Guidelines for appropriate and inappropriate behavior or activities should be clearly explained and distributed in written form prior to the start of an event.

If you are anticipating any type of youth activity including overnight stays, be sure to plan ahead for proper supervision and accommodations.

##### **A. CHAPERONS**

1. Chaperons should be at least 25 years old.
2. Generally, one chaperon should be provided for every 5 to 10 participants. (Please consult your local diocesan youth or school department office for particular recommendations.)
3. A minimum of 2 chaperons should attend any parish or school sponsored event.
4. Both male and female chaperons should supervise co-ed events and field trips.
5. **NO CHAPERON SHOULD BE ALONE WITH A FIELD TRIP PARTICIPANT AT ANY TIME (OTHER THAN A PARENT WITH HIS OR HER OWN CHILD).**
6. No alcoholic beverages may be consumed by any chaperon during a field trip.
7. Adult group field trip participants should fill out and submit a "Waiver and Release" form. (Please see attached forms)

##### **B. PERMISSION SLIPS**

1. Standard parental permission and emergency medical treatment authorization forms (please see attached forms) should be filled out and submitted for all youth activities and field trips for participants under the age of 18. **NO EXCEPTIONS SHOULD BE MADE.**

PAGE 2

2. Participants over the age of 18 should fill out and submit a "Wavier and Release" form.
3. The destination, activities, time frames and method of transportation must be specified.

## II. TRANSPORTATION

### A. CHARTERED TRANSPORTATION

1. Use of chartered transportation, with drivers provided, is preferable.
2. Certificates of Insurance must be provided by the charter company. Liability limits of \$1,000,000 to \$5,000,000 will be required depending on the size of the group transported. Please alert the Insurance Administrators 60 days prior to using chartered transportation to insure fulfillment of diocesan requirements.
3. **USE OF PRIVATE AUTOMOBILES FOR TRANSPORTING LARGE GROUPS IN FIELD TRIPS SHOULD BE AVOIDED WHENEVER POSSIBLE.**

### B. USE OF EMPLOYEE OR VOLUNTEER OWNED VEHICLES

1. Reduce transportation services to the absolute minimum.
2. Drivers should be at least 25 years old. All drivers should be screened carefully. Age and health as well as physical and mental condition should be considered.
3. **DRIVERS MUST HAVE A VALID, UNRESTRICTED DRIVERS LICENSE. A COPY OF EACH DRIVERS LICENSE SHOULD BE KEPT ON FILE.**
4. **THE DRIVER SHOULD CARRY LIABILITY INSURANCE ON THE VEHICLE TO BE USED. THIS IS A KEY ELEMENT SINCE THE INSURANCE CARRIED BY THE DRIVER WILL TYPICALLY BE USED UP BEFORE THE INSURANCE COMES INTO PLAY. THESE COVERAGES ARE SHOWN ON THE DECLARATION PAGE OF THE INDIVIDUAL INSURANCE POLICY. A COPY OF THE CURRENT DECLARATION OF COVERAGE, ALONG WITH A COPY OF THE DRIVERS LICENSE SHOULD BE MAINTAINED ON FILE, E.G., YOUTH MINISTER'S OFFICE, PARISH SECRETARY'S OFFICE, ETC.**
5. One seat belt must be provided for and used by each vehicle: occupant.
6. No private (non-chartered) vehicle, including vans, with more than nine seats should be used. Additionally, no one should ride in the bed of pick-up trucks.
7. Do not allow volunteers to drive diocesan vehicles.
8. Only designated employees should be allowed to drive diocesan vehicles.

### III. HIGH RISK ACTIVITIES TO BE AVOIDED

Every parish sponsored event creates a liability for the diocese. Before planning parish functions, we encourage you to balance the benefits anticipated with the unavoidable liabilities. **Some activities create such a great liability that they cannot be justified.** Sponsorship or involvement in the following activities should be avoided:

- Raft, kayak, canoe or similar trips not operated by a professional organization
- Water and snow skiing
- Wind and water surfing
- Parachute sailing or jumping
- Hang gliding
- Boxing or wrestling matches, martial arts, etc
- Dunk tanks
- Fireworks sales and displays
- Any event involving motorcycles or all terrain vehicles
- Any event involving livestock
- Trampolines
- Mountaineering and rock climbing
- Hayrides
- Bungee jumping
- Ice and roller skating
- Skate boarding
- Any event involving aircraft, including hot air balloon rides
- Boogie boarding
- Use of watercraft in general.

If you are considering participation in any of the above activities, or other unusual activities, permission should be given by the Chancery Office Insurance Department as soon as possible.

### IV. PLAN FOR THE UNEXPECTED

Develop written plans for:

- Emergency reporting and evacuation;
- Emergency medical aid;
- First aid;
- What to do in case an individual (participant or team member) is missing.

Post or circulate emergency plans and telephone numbers.

- Make sure your team is qualified to administer first aid.
- Make sure you have diocesan accident reporting forms.

## 117 SAFE ENVIRONMENT & VICTIM ASSISTANCE

The Charter for the Protection of Children and Youth requires that Dioceses/Eparchies establish “Safe Environment” programs. Article 12 of the charter states:

*“Dioceses/Eparchies will establish ‘safe environment’ programs. They will cooperate with parents, civil authorities, educators, and community organizations to provide education and training for children, youth, parents, ministers, educators, and others about ways to make and maintain a safe environment for children. Dioceses/Eparchies will make clear to clergy and members of the community the standards of conduct for clergy and other persons in positions of trust with regard to sexual abuse.”*

In addition, Article 13 states:

*“Dioceses/Eparchies will evaluate the background of all diocesan/eparchies and parish personnel who have regular contact with minors. Specifically, they will utilize the resource of law enforcement and other community agencies.”*

### **Mandatory Safe Environment Requirements for Employees & Volunteers**

All personnel in every Diocesan institution or Catholic school who work with children, minors and/or vulnerable adults must comply with the Safe Environment Requirements. The following are mandatory requirements for employees and volunteers working in parishes, schools and institutions operating under the recognition of the Bishop of San Jose:

Background Investigation for Employees and Volunteers

Live Scan fingerprint screened and cleared at DOJ/FBI level of service  
ORI Code A3251

### **Safe Environment Training – Adults over 18 years of age**

Live Training is available for new employees and volunteers -OR-

Online training: [www.shieldthevulnerable.org](http://www.shieldthevulnerable.org)

Training is available in English or Spanish, take course 706 “Protect the Children.”

Recertification required every 3 years

Adult Code of Conduct: [English](#) & [Spanish](#)

Safe Environment Training – Youth volunteer under 18 years of age

Volunteers under the age of 18 themselves may be in regular contact with minors/vulnerable adults only if they are under the direct supervision of an adult who is in full compliance with the Safe Environment Requirements and who is on site with them at the time and place of their service.

Teen Leadership Training for youth ages 14 years of age through 17 years of age.

Teen Leadership Training must be recertified every 2 years.

Youth under 14 years of age do not need to attend a training class, but they must be advised of the [Youth Code of Conduct](#), and must participate in the school’s or Faith Formation program’s Safe Environment awareness program.

## **Safe Environment Training – Youth under 18 years of age**

Catholic Safe Environment Curriculum (CSEC) is presented annually in our Catholic Schools and Parish Faith Formation programs.

**Link:** <http://www.dsj.org/ministries/protecting-gods-children/catholic-safe-environment-curriculum/>

If parents or guardians choose not to have their child participate in the safe environment training, the parish must maintain documentation relating to that refusal. Parents/guardians must be given a form to sign that indicates they have been offered the safe environment training. That they decline to have their child participate in such training and that the parish has offered to provide safe environment training materials for the parents/guardians to utilize.

**Link:** <http://www.dsj.org/ministries/protecting-gods-children/for-parents/>

Youth Code of Conduct: [English & Spanish](#)

## **Victim Outreach**

All employees and volunteers must have an understanding of policies and procedures to respond promptly to allegations of child abuse including child sexual abuse and domestic violence. Said individuals are responsible for knowing information regarding procedures and contact numbers to law enforcement, child protection and the Diocesan Office for the Protection of Children and Vulnerable Adults.

## **Safe Environment Documentation**

Parishes are to have available or have access to:

- DSJ Safe Environment Handbook and related OPCVA policy.  
Link: <http://www.dsj.org/opcva-conduct-policy/>
- Written diocesan sexual abuse policy that details the content and activities of the outreach program, explains the composition conduct and responsibilities of the review board; outlines the process for reporting allegations, as well as treatment of victims/survivors and alleged offending clerics; describes the diocesan communication policy; specifics on whom and how background investigations are conducted and includes the codes of conduct and safe environment training for all applicable individuals having regular contact with children and youth.
- Parish bulletin notice that gives contact information for the Office for the Protection of Children and Vulnerable Adults, diocese of San Jose available to parishioners.
- If applicable, documentation of contact with Child Abuse Neglect (CAN) or Child Protective Services (CPS); incident reports & SS 8583 forms.

## **Office for the Protection of Children & Vulnerable Adults (OPCVA)**

Contact Information:

Anthony Gonzalez, Director  
Griselda Cervantez, Victim Assistance Coordinator  
Office Phone Number: 408-983-0113  
Department Email: [protection@dsj.org](mailto:protection@dsj.org)

## **118 USE OF LIGHTED CANDLES**

Lighted candles and the use of matches or any fire is prohibited in a school building. The use of battery candles is highly recommended. The exception would be a special liturgy not in a school building for a Faith Formation gathering where your parish would normally use candles or when you are teaching the symbol of light for Christ. It would be up to the discretion of the pastor to decide when the lighted candles may be used.

## **119 FORMS AND RESOURCES**

- [Safe Environment Policy](#)
- Acknowledgment: Reporting Child and Elder Abuse (English & Spanish)
- Diocesan Parental Permission Form (English & Spanish)
- Diocesan Student Activity Waiver Form
- Incident Report
- Sample Harassment and Bullying Policy
- Sample Visitor Information Form (Attached: English & Spanish)
- Suspected Child Abuse Report (Attached & [Online - Instructions](#))
- Youth Code of Conduct: [English](#) [Spanish](#)
- Catholic Safe Environment Curriculum (CSEC) ([Available Online](#): English & Spanish)
- Parent Option Form ( [English](#) & [Spanish](#))
- Safe Environment Parent Letter (English)
- Safe Environment Resources
- [Office for Protection Victim Resource Page Online](#)
- [Pandemic Flu Faith Formation Appendix C](#)
- Video/Photo Release Form
- Driver Information Form- Questions
- Flu Prevention Requirements for the Classrooms



*Diocese of San Jose*

## Office for the Protection of Children and Vulnerable Adults

### ACKNOWLEDGMENT: REPORTING CHILD AND ELDER ABUSE

#### Child Abuse:

It is my understanding that Section 11166.5 of the California Penal Code requires that any child care custodian who enters into employment after January 1, 1985, acknowledge that Section 11166 requires a child care custodian, medical practitioner, non-medical practitioner, member of the clergy (bishops, priests, deacons), or employee of a child protective agency who has knowledge of or observes a child in his or her professional capacity or within the scope of his or her duties or employment whom he or she knows or reasonably suspects has been the victim of child abuse, to report the known or suspected instance of child abuse to a child protective agency immediately or as soon as practically possible by telephone and to prepare and send a written report thereof within 36 hours of receiving the information concerning the incident.

Further, it is my understanding that teachers, administrative officers, supervisors of child welfare and attendance, or certificated pupil personnel employees of any public or private school are considered to be child care custodians.

#### Elder Abuse:

It is my understanding that Section 368 of the California Penal Code requires that any person who has assumed full or intermittent responsibility for the care or custody of an elder or dependent adult, whether or not that person receives compensation, including administrators, supervisors, and any licensed staff or a public or private facility that provides care or services for elder or dependent adults, or any elder or dependent adult care custodian, health care practitioner, or employee of a county adult protective services agency or a local law enforcement agency, member of the clergy (bishops, priests, deacons) who has knowledge of or observes an elder or dependent adult in his or her professional capacity or within the scope of his or her duties or employment who he or she knows or reasonably suspects has been a victim of elder abuse to report the known or suspected instance of abuse to an adult protective agency immediately or as soon as practically possible by telephone and to prepare and send a written report thereof within 48 hours of receiving the information concerning the incident.

Further, it is my understanding that volunteers and ministers to the homebound or sick, hospital ministry and Eucharistic Ministers to the Sick are considered to be elder care custodians.

**I hereby acknowledge the provisions of Penal Code Sections 368 and 11166 and will comply with these provisions.**

Executed this date \_\_\_\_\_ at (city name) \_\_\_\_\_, California.

\_\_\_\_\_  
Signature

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

**Note: Volunteers are asked to notify a member of parish staff before making an official report.**

*(Please turn page to continue)*



*Diocese of San Jose*

## **Oficina Para la Protección de Niños y Adultos Vulnerables**

### **CONSTANCIA DE RECONOCIMIENTO: ABUSO DE MENORES Y DE MAYORES**

#### **Abuso de Menores:**

Es de mi conocimiento que la Sección 11166.5 del Código Penal de California requiere que cualquier guardián de menores que sea empleado a partir del 1° de enero de 1985 reconozca que la Sección 11166 requiere que un guardián de menores, practicante médico, practicante no médico, miembro del clero (obispos, sacerdotes, diáconos), o empleado de una agencia de protección de menores, quien tiene conocimiento de u observa a un niño/la niña ha sido víctima de un abuso, es responsable de reportar el supuesto incidente de abuso a una agencia de protección de menores inmediatamente o tan pronto como sea posible por teléfono y de preparar y enviar un reporte por escrito dentro de las 36 horas siguientes después de haber recibido la información concerniente al incidente.

Además, es de mi conocimiento que maestros, oficiales administrativos, supervisores del bienestar y cuidado de menores, o personal certificado en la asistencia de maestros, contratado por cualquier escuela pública o privada, son considerados guardianes del cuidado de menores.

#### **Abuso de Mayores:**

Es de mi conocimiento que la Sección 368 del Código Penal de California requiere que cualquier persona que ha tomado responsabilidad, completa o intermitente, para el cuidado o la custodia de un adulto mayor o dependiente, sea o no sea que aquella persona reciba compensación, incluyendo: administradores, supervisores, y cualquier miembro de equipo licenciado; o una facilidad pública o privada que proporcione cuidado o servicios para adultos mayores o dependientes; o cualquier guardián de adultos mayores o dependientes; o practicante de servicios médicos; o empleado u agencia del condado de servicios protectivos para adultos; o una agencia local de policía; un miembro del clero (obispos, sacerdotes, diáconos) que tiene conocimiento u observa, al alcance de sus obligaciones o en su capacidad profesional, a una persona mayor o dependiente de quien sabe o sospecha de haber sido una víctima de abuso de mayores; es responsable de reportar el supuesto incidente de abuso a una agencia protectora de adultos inmediatamente o tan pronto como sea posible por teléfono y de preparar y enviar un reporte por escrito dentro de las 36 horas siguientes después de haber recibido la información concerniente al incidente.

Además, es de mi conocimiento que los voluntarios y ministros a las personas que están internadas en el hospital o que no pueden dejar sus casas, y los Ministros Eucarísticos a los Enfermos, deben de ser considerados como guardianes de mayores.

**Yo, por este medio, reconozco los reglamentos de las Secciones 368 y 11166 del Código Penal de California y que cumpliré con dichos reglamentos.**

Ejecutado en esta fecha \_\_\_\_\_ en (la ciudad de) \_\_\_\_\_, California.

\_\_\_\_\_  
(firma)

\_\_\_\_\_  
(nombre en letra de molde)

***A los voluntarios se les solicita que informen a un miembro del personal permanente de la parroquia antes de hacer un reporte oficial.***  
*(Favor de voltear la página)*

**Parental Permission Form**  
**The Diocese of San Jose**  
**(USE PROGRAM LETTERHEAD)**

**ACTIVITY** \_\_\_\_\_

(Be specific. Describe the activity in detail, including time, place, transportation, etc.)

**CHILD'S NAME** \_\_\_\_\_ **PARISH** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_ **PHONE** \_\_\_\_\_

**SCHOOL** \_\_\_\_\_ **GRADE** \_\_\_\_\_ **BIRTH DATE** \_\_\_\_\_

**PARENT/GUARDIAN'S NAME** \_\_\_\_\_ **HOME PHONE** \_\_\_\_\_ **CELL** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_ **WORK PHONE** \_\_\_\_\_

***PERSON(S) OTHER THAN PARENTS TO NOTIFY IN CASE OF EMERGENCY:***

**NAME** \_\_\_\_\_ **PHONE** \_\_\_\_\_

I, the Parent/(Guardian) of the above named Child, hereby, give my permission for his/her participation in the activity named above. I agree to direct my child to cooperate and conform with the directions and instructions of the parish, school or Diocesan personnel responsible for the activity.

I have the following medical insurance that would cover any hospital, medical and related costs and expenses in the event of illness or accident of an emergency nature, as follows:

\_\_\_\_\_  
\_\_\_\_\_

In the event my child is injured or becomes ill and requires emergency medical attention any resulting hospital, medical or related costs and expenses will first be paid by the medical insurance or benefit plan of mine or my spouse.

I am not aware of any medical condition of my child which would render it inappropriate for him/her to participate in any such activity.

I, hereby give permission to the physician selected by the youth activities supervisory personnel then present to render medical treatment deemed necessary and appropriate by the physician.

Execution of this document is not a waiver of any rights against any responsible party in the event of an accident caused by a third party, including an employee of the Diocese of San Jose.

**PARENT/GUARDIAN'S SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_

**OTHER PARENT/GUARDIAN SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_

**Formulario Para Obtener Permiso de los Padres de Familia**  
**Diócesis de San José**  
**(Use School Letterhead)**

**ACTIVIDAD** \_\_\_\_\_

\_\_\_\_\_  
(Describa detalladamente lo actividad, incluyendo la hora, el lugar, modo de transportación, etc.)

**NOMBRE DEL NIÑO/A** \_\_\_\_\_ **PARROQUIA** \_\_\_\_\_

**DOMICILIO** \_\_\_\_\_ **TELEFONO** \_\_\_\_\_

**ESCUELA** \_\_\_\_\_ **GRADO** \_\_\_\_\_ **FECHA DE NACIMIENTO** \_\_\_\_\_

**NOMBRE DEL PADRE/MADRE/GUARDIAN** \_\_\_\_\_ **TELEFONO (HOGAR)** \_\_\_\_\_

**DOMICILIO** \_\_\_\_\_ **TELEFONO (TRABAJO)** \_\_\_\_\_

***LA PERSONA A QUIEN AVISAR EN CASO DE EMERGENCIA CUANDO NO SE PUEDE LOCALALIZAR A LOS PADRES.***

**NOMBRE** \_\_\_\_\_ **TELEFONO** \_\_\_\_\_

Yo, Padre (Guardián) del niño/a, por la presente doy mi permiso para su participación en la actividad antedicha. Estando de acuerdo, aconsejaré a mi hijo/a a que coopere y se conforme con las direcciones e instrucciones de la parroquia, escuela, o persona diocesana responsable de esta actividad.

Para cubrir costos de hospital, de médico, y otros costos relacionados, en caso de enfermedad o accidente que requiera atención de emergencia, tengo el siguiente seguro médico:

\_\_\_\_\_  
\_\_\_\_\_

En caso de que mi hijo/a sea dañado/a o que se enferme o requiera atención médica de emergencia, cualquier hospital cercano, costos médicos y costos relacionados, serán pagados primeramente por el seguro médico o plan mío o el de mi esposo/a.

No estoy consciente de ninguna condición médica de mi hijo/a que lo/la impida a participar en dicha actividad.

Por la presente doy permiso al médico, seleccionado por el personal supervisorio presente durante las actividades de los jóvenes, dar el tratamiento médico juzgado necesario y apropiado.

El llenar este documento no constituye denuncia de derechos contra cualquier persona responsable en caso de accidente causado por tercera persona, incluyendo a cualquier empleado de la Diócesis de San José.

**FIRMA DE PADRE/MADRE/GUARDIAN** \_\_\_\_\_ **FECHA** \_\_\_\_\_

**OTRA FIRMA DE PADRE/MADRE/GUARDIAN** \_\_\_\_\_ **FECHA** \_\_\_\_\_



## Student Activity Waiver Form

### General Liability

|  |             |
|--|-------------|
| <b>Parish/School Information</b>   |             |
| Location Name:   | Location #: |
| Location Address:  | Telephone:  |
| Contact Name:  | Facsimile:  |
| <p><i>NOTICE TO ADMINISTRATORS/SUPERVISORS: THIS FORM MUST BE COMPLETED AND COPY FILED WHEN A STUDENT PARTICIPATES IN AN ACTIVITY SPONSORED BY THE SCHOOL OR PARISH.<br/>REFER ANY QUESTIONS TO RISK &amp; INSURANCE MANAGEMENT TELEPHONE: 408-983-0250 / FACSIMILE: 408-983-0271.</i></p> |             |

|                                     |                |
|-------------------------------------|----------------|
| <b>Student Personal Information</b> |                |
| Student Name:                       | Telephone:     |
| Home Address:                       |                |
| Supervisor Name:                    | Telephone:     |
| Medical Plan Name:                  | Policy Number: |
| Medical Plan Address:               | Telephone:     |
| Emergency Contact Name:             | Telephone:     |
| Emergency Contact Name:             | Telephone:     |

|                             |                   |
|-----------------------------|-------------------|
| <b>Activity Information</b> |                   |
| Date of Activity:           | Name of Activity: |
| Description of Activity:    |                   |

|  |              |
|--|--------------|
| <b>Waiver Authorization</b>  |              |
| <i>FORM MUST BE COMPLETED IN ALL RESPECTS, SIGNED AND DATED TO AUTHORIZE THE WAIVER.</i>   |              |
| <i>I HOLD THE PARISH AND DIOCESE OF SAN JOSE HARMLESS FROM ANY CLAIM OF INJURY, SICKNESS, ILLNESS OR DAMAGE THAT MY CHILD MAY SUFFER OR SUSTAIN DURING THE ACTIVITY LISTED ABOVE, WITH EXCEPTION TO INJURY OF DAMAGES ARISING OUT OF THE SOLE NEGLIGENCE OF THE PARISH OR DIOCESE OF SAN JOSE.</i>   |              |
| <i>I ATTEST THAT MY CHILD IS PHYSICALLY FIT TO PARTICIPATE IN THIS EVENT.</i>  |              |
| <i>IN THE EVENT MY CHILD BECOMES ILL OR INJURED, I DO HEREBY CONSENT TO WHATEVER X-RAY, EXAMINATION, MEDICAL OR TREATMENT AND HOSPITAL CARE ARE CONSIDERED NECESSARY IN THE BEST JUDGEMENT OF THE ATTENDING PHYSICIAN AND PERFORMED BY OR UNDER THE SUPERVISION OF A MEMBER OF THE MEDICAL STAFF OF THE HOSPITAL FACILITY PROVIDING THE TREATMENT.</i> |              |
| <i>I AM NOT AWARE OF ANY MEDICAL CONDITION WHICH WOULD RENDER IT INAPPROPRIATE FOR MY CHILD TO PARTICIPATE IN ANY SUCH ACTIVITY.</i>   |              |
| Parent Signature:  | Date Signed: |

|                          |                |
|--------------------------|----------------|
| <b>Internal Use Only</b> |                |
| Waiver Received By:      | Date Received: |



## Incident Report

### Property, General Liability & Claims

|  |   |   |                        |             |
|--|---|---|------------------------|-------------|
| <b>Parish/School Information</b>   |   |   |                        |             |
| Location Name:   |   |   | Location #:            |             |
| Location Address:  |   |   | Telephone:             |             |
| Contact Name:  |   |   | Email:                 |             |
| <b>NOTICE TO ADMINISTRATORS/SUPERVISORS</b><br>ALL INCIDENTS MUST BE REPORTED <b>WITHIN 24 HOURS</b> TO THERESA LA VOUN, LOSS CONTROL & PREVENTION COORDINATOR EMAIL: <a href="mailto:LAVOUN@DSJ.ORG">LAVOUN@DSJ.ORG</a><br>THIS FORM IS FOR INTERNAL PURPOSES ONLY. |   |   |                        |             |
| <b>Incident Information</b>  |   |   |                        |             |
| <b>Accident – Non-Employee<br/>Other /Teacher</b>  | <b>Vehicle Accident<br/>Student<br/>Volunteer</b> | <b>Burglary/Theft/Robbery<br/>Parishioner</b> | <b>Property Damage</b> | <b>Fire</b> |
| Date of Incident:  | Time of Incident:                                 | Approximate Value of Loss: \$                 |                        |             |
| Location of Incident:  |   |   |                        |             |
| Description of Incident:   |   |   |                        |             |
| Name of Person Involved in Incident  |   |   | Telephone:             |             |
| Address of Person Involved in Incident:  |   |   |                        |             |
| Description of Property Involved in Incident:  |   |   |                        |             |
| Name of Witness to Incident:   |   |   | Telephone:             |             |
| Address of Witness to Incident:  |   |   |                        |             |
| Name of Witness to Incident:   |   |   | Telephone:             |             |
| Address of Witness to Incident:  |   |   |                        |             |
| Attachments:    Police Report<br>List of Damaged/Lost Items  |   | Damaged/Lost Items Replaced?    Yes    No     |                        |             |
| <b>Report Authorization</b>  |   |   |                        |             |
| <i>REPORT MUST BE COMPLETED IN ALL RESPECTS, SIGNED AND DATED TO AUTHORIZE THE FINDINGS.</i>   |   |   |                        |             |
| Report Completed By:   |   |   | Date Completed:        |             |
| Position/Title:  |   |   | Telephone:             |             |
| <b>Risk &amp; Insurance Management Use Only</b>  |   |   |                        |             |
| Report Received By:  |   |   | Date Received:         |             |
| <b>For emergencies or if you cannot reach someone at the Chancery office, contact: Marizel Bajao, Senior Adjuster 408-260-0153 / 408-260-0154 (F)</b><br><b>GEORGE HILLS COMPANY</b>   |   |   |                        |             |

## *Harassment and Bullying Policy (Sample)*

The (Name) Faith Formation Program believes that any form of harassment or bullying is contrary to belief in the sanctity and integrity of all persons and is committed to providing a healthy, holy and safe environment free of harassment and bullying. Therefore, all students, staff, and volunteers of (Name) Faith Formation Program are forbidden from engaging in any harassing or bullying behavior which is directed at any member of the community -- adult, adolescent, or child -- during arrival and dismissal time, during program hours, or during related activities. This policy also extends to any visitor or guest of the program.

Harassment occurs when an individual is subjected to treatment or to a parish faith formation environment which is hostile or intimidating because of the individual's race, creed, color, national origin, physical disability, or sex. It includes, but is not limited to any or all of the following:

1. Verbal Harassment:

Epithets, derogatory comments, slurs, and jokes; threatening words spoken to another person

2. Physical Harassment:

Unwanted physical touching or contact, assault, deliberate impeding or blocking movements, or any intimidating interference with normal work or movement.

3. Visual Harassment:

Derogatory, demeaning or inflammatory posters, cartoons, photography, written words, drawings or gestures

4. Sexual Harassment:

Unwelcome sexual advances and propositions, threats or demands to submit to sexual requests, requests for sexual favors, and other unwelcome verbal or physical conduct of a sexual nature.

Specific examples of sexual harassment include, but are not limited to:

- a) Making unsolicited sexual advances and propositions.
- b) Using sexually degrading words to describe an individual or an individual's body.
- c) Displaying sexually suggestive objects or pictures.
- d) Telling inappropriate or sexually-related jokes
- e) Making reprisals, threats of reprisals, or implied threats of reprisals following a negative response to sexual advances.

5. Retaliation: Reprisal or threat of reprisal for having reported or having threatened to report harassment or bullying.

Bullying is understood as repeated physical, verbal or psychological attacks or intimidation directed against a person who cannot properly defend him or herself because of size or strength, or because the person is outnumbered or less psychologically resilient. Bullying may be directed toward other students, catechists or volunteers. Specific examples of bullying include, but are not limited to:

- a) assault
- b) tripping
- c) intimidation
- d) rumor spreading and isolation
- e) demands for money
- f) destruction of property, theft of valued possessions
- g) destruction of another's work
- h) name-calling

All individuals are encouraged to report any incidents of harassment or bullying forbidden by this policy to the Faith Formation Director/Coordinator immediately. All allegations will be taken seriously and dealt with in a prompt, confidential, and thorough manner. A charge of harassment or bullying shall not, in and of itself, create the presumption of wrongdoing. However, if it is determined that harassment or bullying has occurred, effective remedial action commensurate with the severity of the offense (up to and including dismissal) will be taken. In addition, appropriate action will be taken to deter any future harassment or bullying. Anyone found to have filed false and frivolous charges will be subject to disciplinary action, up to and including dismissal.

### ***COMPLAINT FILING AND INVESTIGATION PROCEDURES***

The following procedures must be followed for filing and investigating a harassment or bullying claim:

1. The victim (if possible) should tell the offender causing the harassment or bullying that his/her conduct is offensive and must stop. If the objectionable behavior does not cease immediately, the individual must report the harassment or bullying to the Faith Formation Director/Coordinator or to the catechist who will report it to the Faith Formation Director/Coordinator.
2. The individual alleging harassment or bullying will be asked to complete a formal, written complaint. The claim will be investigated thoroughly, involving only the necessary parties. Confidentiality will be maintained as much as possible.
3. The Faith Formation Director/Coordinator must immediately report all allegations of sexual harassment to the pastor and to the Office for the Protection of Children and Vulnerable Adults
4. Once the facts of the case have been gathered, the Faith Formation Director/Coordinator, in consultation the pastor and the Office for the Protection of Children and Vulnerable Adults, will decide whether disciplinary action is warranted. This disciplinary action will relate to the nature, context, and seriousness of the harassment and can include any appropriate form including termination or dismissal.
5. If the complaint is against a person who is not a participant in the Faith Formation program, a staff member, or a volunteer in the program, the Faith Formation Director/Coordinator will inform the pastor and seek advice from the Office for the Protection of Children and Vulnerable Adults.

## Visitor Information Form (Sample)

### Parish Name

We welcome any child who would like to visit the Faith Formation Program at \_\_\_\_\_ with a friend. For their safety and protection we ask that you complete and return the information below to the Faith Formation Director/Coordinator at the beginning of the session. If you have any questions, or if you would like to register your child as a student, please call the Faith Formation Director/Coordinator at \_\_\_\_\_.

\_\_\_\_\_  
*Name of Visiting Child*

\_\_\_\_\_  
*Name of Registered Child*

\_\_\_\_\_  
*Date and Time of Visit*

\_\_\_\_\_  
*Name of Visiting Child's Parent/Guardian*

\_\_\_\_\_  
*Street Address*

\_\_\_\_\_  
*City*

\_\_\_\_\_  
*Zip*

\_\_\_\_\_  
*Daytime Phone*

\_\_\_\_\_  
*Work Phone*

\_\_\_\_\_  
*Cell Phone*

I understand that my child will be asked to abide by the normal procedures and rules of conduct of the Faith Formation Program at \_\_\_\_\_.

I understand that in case of minor illness or injury, first aid will be administered. If serious illness or injury occurs, 911 will be called and an attempt will be made to notify the parent/guardian. If I am unable to be reached, I hereby give my permission for my child to receive emergency medical treatment in the event of an emergency.

I hereby, for my heirs, executors and administrators, waive and release any and all claims for damage I may have against the Faith Formation Program at \_\_\_\_\_ or any assigned personnel for any and all injuries suffered while participating in the above program.

\_\_\_\_\_  
*Signature of Parent/Guardian*

\_\_\_\_\_  
*Date*

## Información Para El Visitante (Ejemplo)

### Parroquia

Es muy grato para nosotros recibir niño/as que deseen visitar el programa de Catecismo con algún amigo/a, en la parroquia de \_\_\_\_\_. Para su seguridad y protección pedimos que llenen éste formulario y lo regresen al/a Director/a-Coordinador/a al principio de la sesión. Si tiene alguna pregunta o desea inscribir a su hijo/a en éste programa, por favor llame al/a Director/a-Coordinador/a, al número \_\_\_\_\_.

\_\_\_\_\_  
*Nombre del visitante*

\_\_\_\_\_  
*Nombre del alumno*

\_\_\_\_\_  
*Fecha y hora de la visita*

\_\_\_\_\_  
*Nombre de los padres/tutores del visitante*

\_\_\_\_\_  
*Domicilio*

\_\_\_\_\_  
*Teléfono (Día)*

\_\_\_\_\_  
*Teléfono del trabajo*

\_\_\_\_\_  
*Teléfono Celular*

Entiendo que mi hijo/a tendrá que acatar los procedimientos y reglas de conducta establecidos por el programa Catequético de la parroquia de \_\_\_\_\_

Entiendo que en caso de enfermedad o heridas menores a mi hijo se le aplicarán los primeros auxilios. Si la enfermedad o herida fueran mayores, se llamará al 911 y se localizará a los padres o tutores. Si no se me pudiera localizar, por éste medio doy permiso para que mi hijo/a reciba tratamiento de emergencia.

Por éste medio renuncio y libero al Programa Catequético y al personal de la parroquia de \_\_\_\_\_ por cualquier demanda que mis herederos, albaceas o administradores pudieran presentar en contra del programa y la parroquia, por daños sufridos en mi persona mientras participaba en éste programa.

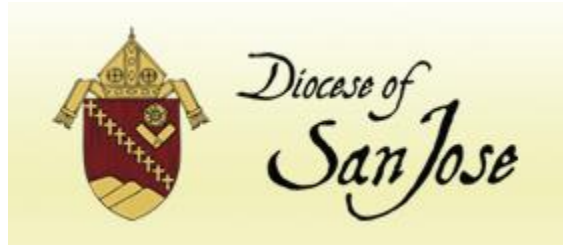
\_\_\_\_\_  
*Firma del Padre o Tutor*

\_\_\_\_\_  
*Fecha*

## Youth Code of Conduct:

1. Every youth is expected to ***act in a Christ-like manner.***
2. Every youth is expected to ***be respectful.***
3. Every youth is expected to ***follow the rules and policies as given.***
4. Every youth is expected to ***cooperate with classmates, teachers, peers and youth leaders.***
5. Every youth is expected to ***communicate in an appropriate manner.***
6. Every youth is expected to ***respect personal boundaries and property of others.***
7. Every youth is expected to ***promote and support a safe, fun and healthy environment through positive participation.***
8. **Youth will not tolerate abuse of any kind, from anyone.**

PDF's of the Youth Code of Conduct in English and Spanish can be found at:  
<https://www.dsj.org/ministries/protecting-gods-children/for-parents/>



## Catholic Safe Environment Curriculum Parent Opt-Out Form

I, \_\_\_\_\_, choose to have my child \_\_\_\_\_, not  
(parent name) (child name)

participate in the presentation of Catholic Safe Environment Curriculum at

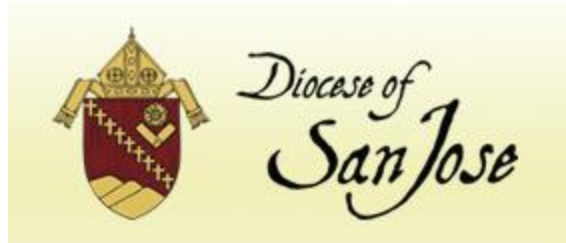
\_\_\_\_\_ on \_\_\_\_\_.  
(parish/school) (date of presentation)

Please initial the following statements.

- \_\_\_\_\_ This form is to be submitted to the parish/school within seven (7) days of the presentation.
- \_\_\_\_\_ I understand that the curriculum is available online at dsj.org.
- \_\_\_\_\_ I understand that I will not send my child to class on the above stated date.
- \_\_\_\_\_ I understand that this form will be kept on parish/school site for audit purposes.

\_\_\_\_\_  
(parent signature)

\_\_\_\_\_  
(date)



## Currículo Católico de Ambiente Seguro Forma Para No Participar

Yo, \_\_\_\_\_, decido que mi hijo/hija, \_\_\_\_\_, no  
(Nombre de Padre/Madre) (Nombre de Hijo/Hija)

participe en la presentación del *Currículo Católico de Ambiente Seguro (CSEC)* en

\_\_\_\_\_ el \_\_\_\_\_.  
(Nombre de Parroquia/Escuela) (Fecha de Presentación)

**Favor de poner sus iniciales en cada declaración.**

\_\_\_\_\_ Esta forma debe entregarse a la parroquia/escuela mínimo siete (7) días antes de la presentación.

\_\_\_\_\_ Entiendo que el currículo está disponible en dsj.org

\_\_\_\_\_ Entiendo que no llevaré a mi hijo/hija a clases en esta fecha

\_\_\_\_\_ Entiendo que la parroquia/escuela guardará esta forma en caso de una auditoría

\_\_\_\_\_  
(Firma del Padre)

\_\_\_\_\_  
(Fecha)



Dear Parents,

In accordance with the USCCB National Charter for the Protection of Children & Young People, the Diocese of San Jose proudly presents the *VIRTUS*<sup>®</sup> Catholic Safe Environment Curriculum. These lessons focus on an age-appropriate discussion of touching safety, relative to the specific roles that different people play in a child's life. All of the lessons stress the importance of keeping private body parts "private."

While this is a Charter Program for our schools/parishes, the Diocese offers an Opt-Out form for parents whom do not wish to have their children participate. The Parent Opt-Out form is available in English and Spanish on the [www.dsj.org](http://www.dsj.org) [website](#). If you do not want your child to attend the *VIRTUS*<sup>®</sup> Catholic Safe Environment class, please download the [Parent Opt-Out](#) form and return it to the school/parish one week prior to the class being implemented. This form is to be kept in a file at the school/parish.

The [Family Safety Session](#) is designed as a comprehensive safety guide for families that have opted-out or missed the live presentation of the *VIRTUS*<sup>®</sup> Catholic Safe Environment Program at their parish or Catholic school, and can be used as a review tool for all families. This guide covers grades K-12th grades. Go to <https://www.dsj.org/wp-content/uploads/2016/07/Family-Safety-Session-201617.pdf>

Your child's CSEC class has been scheduled for \_\_\_\_\_.  
If you have any questions regarding the Diocesan CSEC program, please contact myself, \_\_\_\_\_, or your child's School Administrator or Director of Faith Formation.  
Thank you.

**School/Parish Contact Information**

Contact Name: \_\_\_\_\_

Contact Phone: \_\_\_\_\_

Contact Email: \_\_\_\_\_

**Office for the Protection of Child & Vulnerable Adults**

Phone: (408) 983-0113 | Email: [Protection@dsj.org](mailto:Protection@dsj.org)

# **NO**

I will use words that mean **NO!**

**STOP IT! CUT IT OUT! LEAVE ME ALONE! QUIT IT! DON'T DO THAT TO ME!  
I SAID NO!**

# **GO**

I will get away from the person as soon as it is safe. I will **GO** to a room with other people.  
I will **GO** home. I will **GO** find a teacher or an adult I trust. I will **GO** find my parents.

# **TELL**

I will **TELL** what happened to a trusted adult – my mom, my dad, my grandpa or grandma, my teacher, the police.

**Remember, NO ONE has a right to hurt you. It's NOT YOUR FAULT!**

## Resources for Victims:

|  |  |
|--|--|
| <p><b>Therapist:</b> <i>(Spanish Speakers Welcomed)</i></p> <p><b>Michelle Myers, MFT</b> (408) 359-7754<br/> <a href="http://www.mftmichelle.com">www.mftmichelle.com</a> – Clients 18 and older.<br/>         901 Campisi Way, Suite #350, Campbell, CA.<br/>         95008</p>  | <p><b>Local Counseling Agencies</b><br/> <i>(Spanish Speakers Welcomed)</i></p> <p><b>Alum Rock Counseling Center</b><br/>         (408) 294-0579<br/>         (408) 294-0500<br/>         1245 East Santa Clara Street<br/>         San Jose, CA 95116<br/> <a href="http://www.alumrockcc.org">http://www.alumrockcc.org</a></p>   |
| <p><b>Catholic Counseling Agencies</b><br/> <i>(Spanish Speakers Welcomed)</i></p> <p><b>Catholic Charities Community Counseling Program</b><br/>         Website: <a href="http://www.catholiccharitiesscc.org/">http://www.catholiccharitiesscc.org/</a><br/>         Phone: 408-325-5116<br/>         Email: <a href="mailto:ccs@catholiccharitiesscc.org">ccs@catholiccharitiesscc.org</a></p>   | <p><b>Bill Wilson Center</b><br/>         (408) 243-0222<br/>         3490 The Alameda<br/>         Santa Clara, CA 95050<br/> <a href="mailto:bwcmail@billwilsoncenter.org">bwcmail@billwilsoncenter.org</a></p>  |
| <p><b>Local Counseling Agencies</b></p> <p><b>EMQ Families First</b><br/>         (408) 453-7616<br/>         (408) 379-3796<br/>         232 East Gish Road<br/>         San Jose, CA 95112-4706<br/> <a href="http://www.emqff.org">http://www.emqff.org</a></p> <p><b>Gardner Family Care Corporation</b><br/>         (408) 287-6200<br/>         160 E. Virginia St.<br/>         San Jose, CA 95112<br/> <a href="http://www.gardnerfamilyhealth.org">http://www.gardnerfamilyhealth.org</a></p> <p><b>YWCA of Silicon Valley</b><br/>         (408) 295 4011 ext. 259 or ext. 208<br/>         (Counseling Confidential Intake and Information Line)<br/>         375 S. Third Street<br/>         San Jose, CA 95112<br/> <a href="http://www.ywca-sv.org">www.ywca-sv.org</a></p> | <p><b>Community Solutions (San Jose)</b><br/>         (408) 225-9163<br/>         5671 Santa Teresa Blvd., Suite 104<br/>         San Jose, CA 95123<br/> <a href="http://www.communitysolutions.org">http://www.communitysolutions.org</a></p> <p><b>Community Solutions (Morgan Hill)</b><br/>         (408) 779-2113<br/>         16264 Church Street, #103<br/>         Morgan Hill, CA 95037<br/> <a href="http://www.communitysolutions.org">http://www.communitysolutions.org</a></p> <p><b>Community Solutions (Gilroy)</b><br/>         (408) 842-7138<br/>         6980 Chestnut Street<br/>         Gilroy, CA 95020<br/> <a href="http://www.communitysolutions.org">http://www.communitysolutions.org</a></p> |

**VIDEO/PHOTO RELEASE**

I hereby *grant permission / do not grant permission* (circle one) to \_\_\_\_\_ to videotape/ photograph my child and without limitation, to use such photos, videos and/or stories in connection with any of the work of \_\_\_\_\_ Church without consideration of any kind, and I do hereby release the parish, the Pastor, the parish employees and volunteers from any and all claims whatsoever which may arise in said regard.

\_\_\_\_\_ Catholic Parish agrees that only the student's picture, art, voice, verbal statements, portraits (video or still) shall only be used for public relations, public information, parish promotion, publicity, and instruction. \_\_\_\_\_ Catholic Parish further agrees that children under the age of 18 years who appear in a photograph or video will not be identified by any personal details such as name, address (e-mail or postal), telephone or fax numbers, or classroom assignment.

Sacred Heart of Jesus Catholic Parish will immediately comply with any request by a parent or legal guardian for the removal of specific photographs featuring their child or references to their child's name. Keep in mind that \_\_\_\_\_ Catholic Parish has no control over media/ pictures/statements which are taken by anyone other than our parish employees and volunteers.

Student and Parent/Guardian understand and agree that photos, videos and/or student statements may be used in subsequent years.

If the Student and/or Parent/Guardian wish to rescind this agreement they may do so at any time with written notice.

**Child's Name:** \_\_\_\_\_ **Effective Date of Agreement:** \_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
Signature of Parent or Guardian

\_\_\_\_\_  
Signature of Parent or Guardian



## **FLU PREVENTION REQUIREMENTS FOR THE CLASSROOMS**

- **Have all the students wash their hands with soap and water prior to entering the classrooms**
- **Distribute anti-bacterial wipes and wipe down table and chair surfaces at the beginning and end of each session**
- **Distribute supplies and have them keep their own supplies for the entire year in each Ziploc bags labeled with their names**
- **Snacks served at gatherings should be in the form of single-serve, individually- wrapped foods. Do not use a common food source (such as a bowl of candy, chips, popcorn).**
- **Do not hold hands even at prayer**
- **Have each child wash their hands with soap and water each time they blow their nose or have to use the bathroom**
- **In the classroom encourage the children to use hand sanitizer, tissue and trash receptacle.**