



**Safe Environment
DWC DOCS
Principal/Pastor
Meeting**

2 August 2023

PRIORITY

- Next
- Tomorrow
- Later
- NOW


**KEEP
CALM
AND
GET IT
DONE**

**SAFETY
FIRST**

IMPORTANT



Getting it done
≡ vs ≡
Doing it right

**Just
do it!**

Safe Environment Requirements

- Volunteers and Employees:
 - 1. Background Check
 - 2. Review and acknowledgement of Policies and Forms
 - 3. Completion of Awareness Training
- Compliance is achieved when ALL three are in place
- Compliance must be MAINTAINED and DOCUMENTED
- This is a process that never ends!

Local Level Safe Environment Coordinators

- Does your school have one or more appointed? (Yes, this position can be job-shared!)
- Local Level Coordinators are responsible for ensuring that all employees and volunteers are compliant with Safe Environment and that compliance is recorded/documentated in the VIRTUS system.
- In some cases, the Local Level Coordinator IS the principal by choice.
- If you do not have a Local Level Coordinator, please appoint one without delay. Otherwise, the Local Level Coordinator is YOU.
- As principal, you are welcome to have access to the VIRTUS system so that you can see and access everything your Local Level Coordinator sees and accesses. Contact Safe Environment if you need access.
- No matter who the Local Level Coordinator is, principals and pastors are ultimately responsible for Safe Environment compliance or the lack thereof.

2023 Audit Results and Action Items



Overall, the Diocese has a strong Safe Environment program!

Areas where we need to improve:

- All records in VIRTUS must be reconciled and accurate. Do this without delay. There will be no future courtesy for parishes and schools whose records are not cleaned up, current, and accurate.
- DEFICIENT VS. FAILED; SCHOOL VS. PARISH
- All parishes and schools need to use the same Opt-Out Letter for VIRTUS training for children.
- Reporting posters need updated to include the EthicsPoint reporting platform and Victims Assistance. (COMING SOON! CHECK EMAIL!)
- Continuing Education – (COMING SOON! CHECK EMAIL!)

A Word About Continuing Safe Environment Education

Prepare yourselves:

- Under direction from the Bishop, all clergy and Catholic school personnel will be required to undergo yearly Safe Environment training. This will be in addition to the monthly bulletins you already complete.
- Safe Environment is presently working on a plan of execution for yearly training and will advise once it is finalized and in place.
- We will let you know how and when we will accomplish continuing education training soon.
- Likely a mix of VIRTUS and some in person sessions.
- As always, we will communicate to parishes and schools via [DWC.org](mailto:DW@DWC.org) email addresses.

AUDITS, AUDITS, and MORE AUDITS



REMEMBER: THERE ARE 2 AUDIT TRACKS EVERY YEAR NOW

- Our Bishop loves audits!
- Data collection (April/May every year)
- On-Site Audit (can be any time between February and November every year)
- On-Sites also have a hybrid option. The entire Diocese is eligible for an on-site audit, no matter where you are
- Plus, when CSI fingerprints, they will spot check/audit!
- Check your DWC.org email for information!

AUDITS are about **PREPAREDNESS**

Safe Environment compliance is not a sprint ... it's a marathon!

You must check and maintain Safe Environment compliance for your employees and volunteers weekly, monthly, and yearly.

Just because you pass an audit in any given year does NOT mean you will be found compliant in future years.

Background checks for employees and volunteers are due every 3 years and people are always coming and going.

You **MUST** keep up on it!

Compliance **MUST** be recorded in the VIRTUS system. This is the system that will be used to audit your parish or school. We are all electronic now.



Follow the Guidelines



Audit Preparation Checklist document

Follow the guidelines; they are the basis for the Safe Environment program and will help ensure successful audits for your parish or school

- Distributed here in hard copy
- Will email again at the start of school year

Employee vs. Volunteer

Employees and Volunteers must be set up and properly identified as Employee or Volunteer in the VIRTUS system.

REMINDERS:

An employee is anyone who is paid for services. A volunteer provides services at no cost to the parish or school.

Ensure that employee background check renewals are the EMPLOYEE PACKAGE. Ensure that Volunteer background check renewals are the VOLUNTEER PACKAGE.

Note: Compliance reports are incorrect when roles and profiles do not match, so please ensure that all employee and volunteer accounts are properly designated in the VIRTUS system.

Diocesan-wide clean up is mandatory; grace period is over



In July 2022, the Diocese went live with the new Virtus Safe Environment Tracking Platform. The conversion went well. We have worked vigorously here at the Chancery to reconcile records, merge duplicates, and get other records in their proper locations. We are pleased to say that after a year, thousands of records that were in the Chancery queue have been reconciled.

As mentioned earlier, **ALL** records in the entire VIRTUS system must be reconciled and accurate. **Do this without delay.** There will be no future courtesy for parishes and schools whose records are not cleaned up, current, and accurate. With this in mind, Safe Environment's attentions will now move toward **helping** parishes and schools achieve this by working with them on a one-on-one basis.

As we move through the list of parishes in schools, please prepare by doing the following:

1. Prepare a list off all committees, groups, activities, festivals, ministries, employees, and volunteers at your locations. To assist you, please see the compliance list in the back of the diocesan policy manual.

Diocesan-wide clean up is mandatory; grace period is over - CONTINUED



2. Review the master report **for both inactive and active members combined.**

3. Please merge any duplicate records.

4. Review the master report for inactive, moved, or deceased volunteers and employees.

5. Use the STOP SIGN to end date the records of any volunteers and employees who are inactive, moved, or deceased.

These simple and basic actions are a good starting point to getting your records cleaned up.

Every year during the data collection audit, parishes and schools use the audit form to report about 4,000 – 5,000 active employees and volunteers.

According to VIRTUS, we have around 18,000 active employees and volunteers.

As you can see ... we have about 13,000 records to clean up throughout the entire Diocese!

Our goal is to have this done no later than January of 2024. The next on-site audit cycle will be February – November of 2024.

Some Reminders About Reports:

The VIRTUS system has a robust reporting function. Some are perplexed by “wrong” reports, when, in fact, they are not actually wrong.

When running reports:

- Pay attention to the type of report you select. Think about what kind of information you are trying pull, and select your report accordingly.
- Pay attention to your filters. A lot of people think their report is “wrong” when, in fact, they simply don’t have the appropriate filters selected.
- As the data gets more accurate, your reports will get more accurate.
- We are happy to help you!



A person is sitting at a wooden desk, using a laptop and a smartphone. The person's hands are visible, holding the smartphone. The laptop is open, and a printer is visible in the background. The scene is brightly lit, suggesting an office or home workspace.

A Quick Recap

All Safe Environment requirements can be completed online/electronically now: background check, awareness training, and document acknowledgements



Electronic vs. Paper

Electronic

- Easy way
- Less work for you
- Documentation of compliance is assured and automatic

Paper

- Is still an option
- More work for you
- YOU must manually document compliance

Employee vs. Volunteer

Employee

- You must run a background check FIRST
- Then you complete an onboarding form and send it to HR
- Then HR sends an onboarding link to the employee to complete all HR forms, including the Safe Environment process

Volunteer

- They can go to virtusonline.org and complete the entire process from start to finish themselves



Teaching Safety Lessons for Children

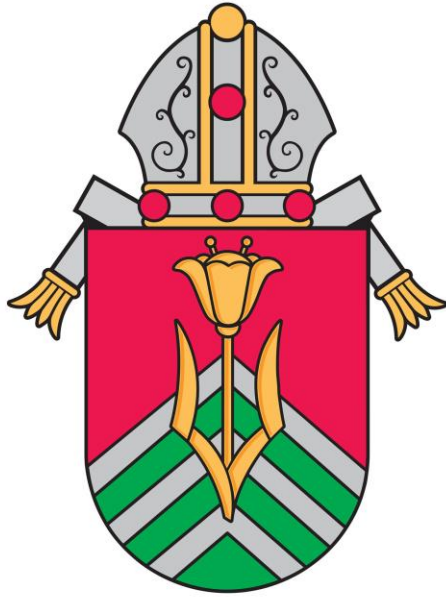
- 2 Lessons per year are required for K-12, Catholic schools and PSR
- One lesson by the end of October, the other by the end of the school year
- Opt Out Letter to parents 2 weeks in advance; make sure you offer lessons to parents to view in advance or to teach at home; **PLEASE USE THE VIRTUS OPT OUT LETTER TEMPLATE ONLY. FOUND UNDER THE EDUCATOR'S TAB IN VIRTUS.**
- Record your training numbers under the Educator's Tab in VIRTUS
- All materials and resources are available under the Educator's Tab in VIRTUS
- DRE and/or Local Level Safe Environment Coordinator should have Educator's Tab



Teaching Safety Lessons for Children

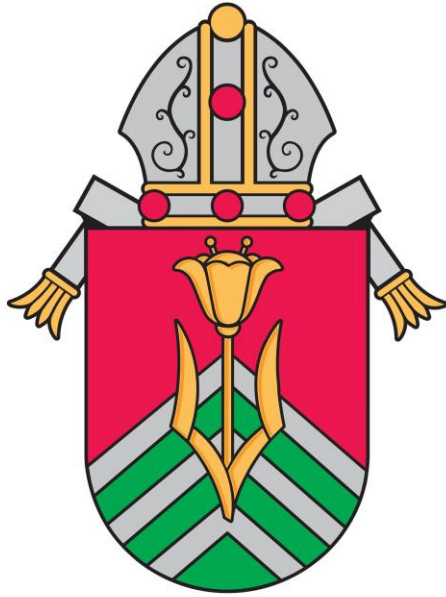
**For the 2023-24
school year, the
lessons are:
1 and 2 for all
grade levels.**





DIOCESE OF WHEELING-CHARLESTON

The following language has been used to describe employees or volunteers to whom the Safe Environment process applies: with or around children; directly or indirectly with children; directly or where minors are present while performing one's duties; or access to children. All versions expressed herein, and any iterations with similar verbiage, retain the integrity of the Diocese's policy for protecting children, and compliance is required.



DIOCESE OF
WHEELING-CHARLESTON

This list is designed to assist Diocesan leaders in determining when to apply Safe Environment. It is not all inclusive and there may be other roles that require Safe Environment compliance that are not listed here. Please contact the Office of Safe Environment at the Chancery with any questions regarding compliance.

The List

- Safe Environment compliance applies to those age 18 or older.
- - All priests, deacons, and seminarians
- - All employees at Catholic schools
- - All volunteers at Catholic schools
- - All volunteers affiliated with sports, including coaches, concessions, score keepers, referees, and any other roles
- - All employees and volunteers of daycare centers
- - Professionals or special guests whose roles require regular or recurring presence in the Catholic school or at Catholic school activities or the parish (recurring may include: daily, weekly, monthly, or yearly)
- - All parish employees
- - All employees of any other diocesan-related entity

- Parish volunteers including (age 18 and older):
 - Adult altar servers
 - Eucharistic ministers
 - Readers/Lectors
 - Greeters
 - Ushers
 - Money Collectors/Counters
 - Sacristans
 - Choir/Music Director/Choir Members/Musicians
 - Cantors
 - Directors of Religious Education
 - Parish School of Religion teachers
 - All adult volunteers affiliated with youth and/or youth group activities in any capacity

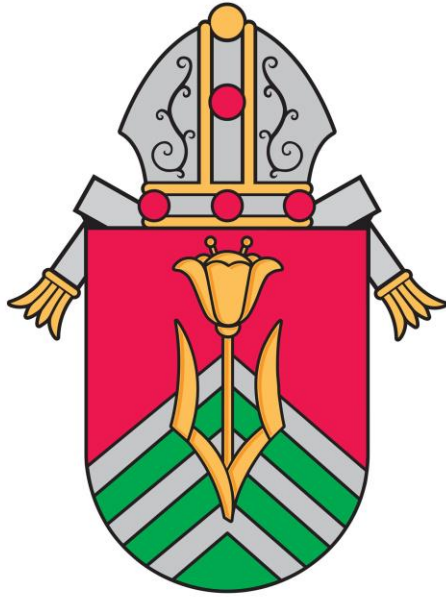
- All adult volunteers affiliated with youth/summer camps in any capacity
- All adult volunteers affiliated with Vacation Bible School in any capacity
- All adult volunteers involved in any activity that includes or involves children in any way
- Funeral luncheon volunteers
- Fish fry volunteers
- Festival volunteers
- Picnic volunteers
- Homebound ministries or any activities relative to vulnerable adults
- Any activities/ministries involving nursing homes and/or nursing home residents
- Any activities relative to Boy and Girl Scout councils
- Any activities involving childcare, babysitting, or before and aftercare
- Any volunteers who provide maintenance services in parishes or schools

Where do I find the list?

www.dwc.org

Under Offices, then Safe Environment, then Download Files and Forms, then the Policy Booklet
It is in the back of the Policy Booklet dated January 2023

In fact, ALL Safe Environment documents and resources are online and available 24/7 via dwc.org and/or the DOCS principal portal.



DIOCESE OF
WHEELING-CHARLESTON

How to Report

- Civil Authorities (numbers vary according to jurisdiction)
- Child Protective Services for the State of West Virginia
- EthicsPoint (www.dwc.org)
- ReportBishopAbuse.org
- Office of Safe Environment (phone or email)
- Human Resources (phone or email)

IMPORTANT REMINDERS

- Background checks are every 3 years
- Fingerprints are every 3 years
- Use your dwc.org email address as assigned by the Chancery IT Department
- The reporting requirement for the state of West Virginia is 24 hours

Monthly Safe Environment Zoom Meetings

We hold regular Safe Environment meetings via ZOOM for Local Level Coordinators, principals, and clergy. You are welcome and encouraged to attend. They are usually held monthly and last anywhere from 60 to 90 minutes, depending on what's going on in and around the diocese. These are opportunities for us to connect with our parishes and schools, let you know of updates, changes, and progress, and to entertain your questions and concerns. An email with connection details is sent out two weeks in advance of each meeting with the date and time. This information is sent to all dwc.org email addresses. Check your dwc.org email addresses!

**QUESTIONS?
CALL SAFE
ENVIRONMENT**

304.230.1504 or email

sgoudy@dwc.org or

ddean@dwc.org