



Diocesan Policy on
Responsible Pastoral Ministry
Implementation Guide

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Responsible Pastoral Ministry is every pastoral ministry and action committed never to engage in any form of abuse, whether sexual, physical, spiritual, or financial, against any minor or vulnerable person in order to protect the dignity and the integrity of all people, in recognition of the inherent worth and divine image present within each individual.

The Canadian Conference of Catholic Bishops uses this [definition](#)¹:

***Responsible Ministry** is a term that applies to all clergy (Bishops, Priests, Deacons), as well as officially mandated pastoral agents (be they laity or members of institutes/religious orders) and entails a commitment on their part to protecting minors and all persons from sexual abuse/assault, developing and implementing strong protocols aligned with canon and secular laws in Canada, and fostering pastoral compassion toward victims-survivors, their families as well as affected faith communities.*

1. BENEFITS OF A RESPONSIBLE PASTORAL MINISTRY POLICY

Fully aware of its obligation to ensure the safety and the integrity of all those to whom she brings the Gospel message, the Catholic Church of Montreal has adopted a Responsible Pastoral Ministry Policy aimed at:

- **Preventing any form of abuse against children, young adults, or vulnerable persons.** Prevention involves implementing a screening process and enforcing a Code of Ethics and Conduct to prevent opportunities for abuse, neglect, and/or harm. In the second sentence, we have ‘prevention’ and ‘prevent’. How about ‘eliminate’ or ‘remove’ instead of ‘prevent’?
- **Protecting** clergy, staff, and volunteers against allegations of wrongdoing. The intention is to safeguard the integrity, safety, and reputation of all those involved (volunteer or salaried) in recognized pastoral activities.
- **Restoring trust** in the Catholic Church and the credibility of its commitment. The goal is to foster responsible pastoral ministry that prioritizes safety, transparency, and accountability.
- **Providing training and support** for clergy, staff, and volunteers.
- **Reporting** all incidents involving abuse, mistreatment, and / or harm. Such incidents, whenever or wherever they occur, are to be reported immediately to the appropriate authorities.

¹ <https://www.cccb.ca/about/responsible-ministry/>

2. DEFINITIONS

The diocesan policy and procedures for staff management outlined in this Guide are applicable to all members of the clergy and laypeople, whether mandated or not, and regardless of their status as salaried or volunteer individuals working in the Catholic Church of Montreal's parishes, missions, and diocesan organizations, despite the definitions provided.

Abuse: Abuse involves exerting undue and harmful power over another person. In the context of the abuse we are describing here, it usually involves an adult or a person in a position of power exercising control over a vulnerable person. The effects of such abuse can result in wounds of varying depths for the victim including physical, psychological, spiritual, financial, or sexual harm.

Criminal record: Conviction for a criminal or penal offence incompatible with the position held or applied for, as well as any misconduct or information giving rise to fear that the candidate's past or current conduct poses a risk to the physical or moral safety of vulnerable persons with whom he or she works or may be required to work.

Duty of care: This legal principle determines the obligation of individuals and organizations to act responsibly to protect the interests of others, and to avoid acts or omissions likely to cause harm to others. The duty of care is at the basis of the screening process.

Event: Occasional or one-time events organized by a parish community or a diocesan organization. Examples include parties, concerts, or annual picnics.

Minor: A person under 18 years of age.

Participants: people who take part in a program or event, or who receives services through the diocese or parish as a beneficiary / recipient of the parish or diocesan pastoral service.

Pastoral program: A series of structured activities or similar events, organized and coordinated by the parish or the diocese, extending over a certain period of time, throughout which the risk level remains relatively constant. Examples include catechetical encounters, spiritual accompaniment, visits with the sick or the elderly in their homes, visits to priests who are retired, ill and / or elderly and weekly youth group meetings.

Person in charge: This term refers to an individual who is designated by the Christian community or diocesan authorities as being responsible for the planning, coordination, and execution of any pastoral activity on behalf of the parish or diocese. These activities may include programs, activities, camps, visits, events, etc. The person in charge may also supervise or lead the work of salaried or volunteer staff, and must be at least 18 years of age.

Volunteer: A person who:

- decides of his or her own free will to provide a service;
- accomplishes such an activity or task without being forced or feeling obliged to do so;

- performs this activity to help a person, an organization or the community as a whole;
- is not remunerated for this service or activity.

Volunteers between the ages of 14 and 18 are required to comply with the same policies as laid out in this Guide.

Although this guide deals specifically with the screening of volunteers, the same principles apply to paid employees and priests.

Vulnerable person: Individuals who, due to age, disability or temporary / permanent circumstances, face challenges or are incapable of protecting themselves. This puts them at a higher risk of experiencing abuse, mistreatment, or aggression. Vulnerable individuals may struggle to adequately protect themselves, rely on others in positions of trust or dependency, or find it difficult or impossible to report any abuse they may experience.

3. GUIDELINES FOR PEOPLE IN CHARGE

Effective management of human resources and the thorough application of the screening process are imperative for the Catholic Church in Montreal. Unfortunately, while every effort is made to prevent abuse and mistreatment, no procedure is flawless or entirely risk-free. While screening protocols consist of policies and procedures, they ultimately rely on the exercise of sound judgment. Therefore, individuals tasked with carrying out these screening procedures, at all levels within the Montreal Catholic Church are urged not to simply follow them as a set formula. Their primary tool should be their own discernment. For each of the 10 screening steps, those responsible for applying the screening procedures will have to exercise their judgment.

Important distinction

In the Church, it is hoped that all the baptized will bear witness to their love of Christ and to the faith that dwells within them. We must nevertheless be aware that the employee or volunteer may be closely identified with the parish and/or the diocese. Parish and diocesan authorities are invited to be attentive and make distinctions between recognized pastoral activities and the personal initiatives driven by the apostolic zeal of their paid or volunteer staff.

Care should be taken to:

- Make a clear distinction between what is a recognized activity, that is, one that is conducted by the parish or diocese, and an activity that is not, such as a spontaneous mutual aid, personal initiative, etc. Make sure this distinction is clear to parish and diocesan authorities

to salaried and volunteer staff, and to those who usually participate in or benefit from pastoral services.

- Make it clear to staff who are identified with the institution that the recommended Code of Ethics and Conduct applies at all times, even when they are not working in the context of a recognized activity.
- Remain vigilant in the context of personal initiatives. While such initiatives can be manifestations of love of neighbour, they can also be indicative of people's particular interests and motivations.

4. APPLICATION

This Guide applies to all volunteers, employees and members of the clergy working in the Archdiocese of Montreal, in all parishes, missions, diocesan offices and services, diocesan organizations, and parish ministries.

Each parish priest, mission leader and those responsible for diocesan organizations, offices and services must ensure that the diocesan responsible pastoral ministry policy is implemented and employed appropriately. They can count on diocesan support and identified external resources (Implementation tools - Appendix 1).

Background and police record checks for people in all high-risk positions will be coordinated with the diocesan Responsible Pastoral Ministry Service.

5. SCREENING PROCESS

Screening is the process used by organizations to carefully scrutinize the people who apply for volunteer or paid position, with a view to selecting the best candidates and eliminating, as far as possible, those who are incompetent, threatening or dangerous. Screening is a responsible human resources management activity, the aim of which is to create and preserve a safe environment.

Such a process requires the identification of any activity related to a service provided by a paid or unpaid person. The screening process promotes the appropriate matching of a candidate/applicant to an assignment/role. It involves assessing the risks inherent in the role, describing the applicant's duties, determining the suitability of a candidate for the role, if necessary, conducting background checks, providing training and, modifying, as needed, the terms and conditions under which the assignment is performed.

The screening process begins before a person offers his/her services and ends once he/she leaves the organization. The steps in the screening process, developed by Volunteer Canada, are listed

below and have been adapted for our Church's realities. They are divided into three parts: pre-screening, the screening process, and management.

Before the selection of staff and volunteers

1. Job Descriptions
2. Risk Assessment
3. Formal Recruitment Process

The selection process

4. Application Form
5. Interview
6. References' Checks*
7. Police Checks**

Management of employees and volunteers

8. Orientation and Training
9. Support and Supervision
10. Follow-up and Feedback

** Mandatory for all employees and for volunteers in high-risk positions.*

*** Mandatory for those in high-risk positions.*

Steps 1 to 5, and 6 where applicable, must be completed before a new employee or volunteer starts work.

All those in high-risk positions must undergo a police background check at least every six (6) years. For mandated personnel, in the event of any new appointment, a verification must have been conducted within at least the last three (3) years.

All active employees and volunteers at the time of the implementation of this policy must be informed of the Code of Ethics and Conduct and sign the commitment form.

All employees and volunteers who currently or eventually will occupy high-risk positions must complete the Focus on the Victims of Abuse awareness training program.

This entire process is not associated with a person, but with the assignment. It is therefore essential that the person responsible for implementing the diocesan policy and for overseeing the screening process reviews all ten (10) steps whenever a volunteer or an employee changes

function. In cases where a person has more than one assignment or occupies more than one position, he/she must be screened for the assignment that entails the greatest risk.

For each case that he/she has to examine, the person responsible for implementing the diocesan policy and overseeing the screening process must use discretion and apply good judgment throughout each of the 10 steps.

6. THE TEN STEPS OF SCREENING

Step 1 – Job Description

The job description for volunteers (see *Tools for implementation - Appendix 2*) is an effective and necessary tool. It is similar to a job description for a salaried position in that it defines the tasks to be accomplished within a particular service or pastoral activity. If we need the services or skills of a person, it is appropriate that we state clearly what is expected of him/her and do so in writing. The volunteer position description sets out the skills, the degree of experience and the qualities required or desired for that position. The level of risk associated with the position can also be more easily identified.

The job description (Appendix 2) includes most of the following elements:

- Job title
- Purpose of the position
- The clientele or the participants served
- Tasks and activities specific to the position
- The description of responsibilities
- Skills, experience or qualifications required
- Identification of the supervisor to whom the position reports
- Information on the terms of employment (hours, location, working conditions, etc.).

At the interview (step 5), we ensure that the interviewee/applicant has a copy of the job description.

Step 2 – Risk Assessment

The risk analysis (see *Tools for implementation - Appendix 3*) associated with a job or position is essential in determining the appropriate screening measures. It is this analysis that will guide those responsible for the rest of the 10-step screening process. Screening is always linked with the job or position, not the individual. For example, if a well-known volunteer, who has been employed in a low-risk role for several years, changes position, he/she must still undergo the required screening process for a role involving greater potential risk. It is the risk assessment

(Appendix 3) that determines how the 10 steps are applied, not the person or their knowledge of it.

Potential risk can be classified according to a scale from low to high. The factors to be considered in establishing the level of risk are:

- Participants or beneficiaries (age, physical condition, degree of vulnerability);
- Environment (location of the activity, physical layout, public/private)
- Activity (type of service provided: animation, counselling, visit)
- Supervision (personal present, direct, indirect, frequency)
- Nature of relationship (individual, group, intensity, intimacy)

	Position or task									Risk	
	Low			Medium				High			
Participants	1	2	3	4	5	6	7	8	9	10	
Environment	1	2	3	4	5	6	7	8	9	10	
Activity	1	2	3	4	5	6	7	8	9	10	
Supervision	1	2	3	4	5	6	7	8	9	10	
Nature of relationship	1	2	3	4	5	6	7	8	9	10	

As the risk analysis is dependent on the perception and judgment of the person responsible for implementing the policy, it is recommended that at least two other people, including the diocesan Coordinator of Responsible Pastoral Ministry, should be involved in the exercise in order to compare different perceptions and take into account sensitivities and tolerance levels.

The risk assessment must be revised each time a change occurs in any of the five factors listed above. The same procedure must be followed for every special event undertaken.

Completed risk assessments must be dated, signed, and retained for future reference.

As you can see, risk analysis is based on the job itself, but then it is important to remember that it is also possible to reduce risk by lowering one or more of the above-mentioned risk factors. In other words, it is possible to alter/adapt the activity or the environment where it takes place, in order to reduce risk.

Step 3 – Recruitment Process

With recruiting (seeking or requesting assistance) comes the selection process that involves choosing and matching the right person with the right position. This is a two-way process, as the

candidate must also discern whether the role/job and your organization and/or the Church's mission are appropriate for him/her or we could say 'suited to him/her'. To this end, the information contained in the job description will be invaluable (clientele, tasks, schedule, location, etc.).

Parishes and the diocese have differing strategies for recruiting their volunteer or salaried staff. It is appropriate to proceed as usual, favouring clear, written documents wherever possible.

In general, the recruitment of paid staff is quite formal: job posting, descriptive documents, conditions of employment. Volunteer recruitment is often much less formal, relying on personal contacts and connections that can complicate the screening process. Recruiters may feel uncomfortable formalizing such procedures. Here are a few ways to make a smooth transition from an informal to a structured process:

- Provide a document describing the need (or a job description) upon approaching a prospective volunteer.
- Explain from the outset that the parish has responsibilities and that everyone (volunteers and salaried staff) must go through a formal process in order to work within the community in accordance with the *Policy on the terms and conditions of employment and volunteering in the Archdiocese of Montreal*. The impression must not be given that anyone who applies is accepted. The help you are asking for is important and the recruitment process must be treated seriously. Being invited to offer one's services is a privilege and represents one's commitment to a sacred mission.
- Communicate information on your screening methods. It is best to avoid surprises and to give people the opportunity to withdraw their application of their own accord.

Experience shows that those solicited clearly understand why screening is needed, and they appreciate giving their time and get involved with a serious and responsible organization.

Step 4 – Application Form/Identification Form

An application form for a volunteer position or an identification form for a salaried position (see *Tools for implementation – Appendices 5, 6 and 7*) must be completed by each candidate. The form is used to collect basic information such as name, address, and experience, which will allow parishes, offices, or services to check references as and when the risk associated with the position so requires. The form contains only such information as is needed to make a decision on the applicant's suitability. The application/identification form must be securely and permanently filed in the applicant's file.

This form should:

- Record contact details and relevant information about the applicant. Only the information needed should be requested.
- Ask for at least two references.

- Request authorization to do reference checks and a police check, if required.

Step 5 – Interview

All candidates offering their services, whether at the diocesan or parish level, must be interviewed (see *Tools for implementation – Appendices 8 and 9*). Interview questions should relate to the candidate’s background (experience and training), current situation and motivation, all the while respecting personal rights and freedoms (see Appendix 10).

The interview provides the opportunity to assess the candidate’s interpersonal skills and maturity. Particular attention should be paid to:

- Social skills (communication, collaboration, teamwork, etc.)
- Attitudes (openness, respect, dedication, reliability, etc.)

Particularly in the case of an interview for a high-risk position serving a vulnerable clientele, it is important to explore the candidate’s motivation for wanting to get involved with this group.

During the interview, the interviewer must clearly describe the position. This is also the time to inform the candidate of his/her role and limits within the diocesan or parish organization. The candidate should also be informed of the following stages: the orientation period, during which he or she will be presented with the Code of Ethics and Conduct and other relevant documentation; the training to be received; and the performance review process, supervision, and evaluation.

The interview should not last more than one hour. Interview notes should be kept secure and remain confidential.

Step 6 – References

This step is only required for paid or high-risk volunteer positions (*Appendix 4*). Three references are requested in the application or identification form (step 4). The applicant's written consent must be obtained before reference checks are carried out. Verification of at least two of these references is required. Referees (persons whose names are provided as references) may be employers, volunteer leaders, parish priests, and community members with no family ties to the applicant. This check is usually carried out by telephone and rarely takes more than 10 minutes. Reference checks (see *Appendices 11 and 12*) are often a very effective screening tool. Do not assume that this step is unnecessary because candidates only provide references that are favorable to them. People do not expect reference checks to be done. The results of the checks should be stored safely and confidentially.

Step 7 – Background Checks

A background check is required for anyone applying for a high-risk position (*Appendix 4*). Contrary to popular belief, this is not the stage that constitutes screening, but the application of all ten steps combined that will reduce the potential risk of abuse.

Background checks are carried out under a Memorandum of Understanding between the *Service de police de la Ville de Montréal (SPVM)* and the Archdiocese of Montreal for those working with vulnerable clientele and a private firm for other high-risk positions (see *Appendix 13*). The diocesan department in charge of Responsible Pastoral Ministry informs parishes and other organizations under its authority of the application of these protocols.

The mere requirement that a candidate fill out an application for a police record check can be a deterrent. However, it would be an error to rely solely on this factor.

Background checks should be conducted for anyone moving from a low- or medium-risk position to a high-risk one. Background checks must be updated at least every six (6) years.

- **The preceding steps enabled us to select volunteer or salaried staff. A decision was made whether to accept or reject a candidate to work in the organization. These seven (7) steps have made it possible for us to ensure, to the best of our ability, that the person selected is fit to perform the duties and responsibilities specified in the job description and that he/she can be entrusted with the clientele assigned to him/her.**

Step 8 – Orientation and Training

Once the candidature has been accepted and those concerned are satisfied that he/she will perform all the duties set out in the job description, the screening process is not yet over. Vigilance regarding all those involved in pastoral ministry, whether employees or volunteers must be exercised on an ongoing basis. The candidate must be considered to be “on probation” for a designated period of time that is clearly stated to him/her. This period allows both the employer and the employee to ensure that they have made the right choice or to reconsider if necessary.

Volunteer follow-up form (*Appendix 14*)

The Orientation and Training stage provides the opportunity to:

- Review with participants the practical aspects of the role, the objectives and expectations of parish leaders, as well as the internal functioning of the organization (procedures, reporting structure, responsibilities, etc.),
- Familiarize the person with the tools they will be using (programs, catechetical curriculum, etc.),

- Become familiar with and adhere, in writing, to the Code of Ethics and Conduct of the Catholic Church of Montreal (Appendix 15),
- Get to know the people better.

The orientation and training periods that you determine are mandatory. Refusal to participate should not be accepted. Individuals who have the time and desire to work, whether as volunteers or salaried employees should understand that training is part of the job. Successful volunteer applicants will sign a mutual commitment agreement with his/her parish (see Appendix 16). The employee will sign a contract.

Step 9 – Support, Supervision and Evaluation

All persons working in a parish or in any of the diocesan offices or services will be supervised and evaluated by their manager. The methods and frequency of evaluations will vary depending on the nature of the role and associated risks. It is necessary, therefore, for the supervisor to plan the method of evaluation in advance, to inform those concerned and, where appropriate, to spend some time with them to observe their progress, provide support and offer feedback on their gifts, talents and skills, their style, strengths, and challenges.

In the case of positions of trust, supervision must be conducted regularly. Notes from these evaluations should be written down, however concisely, and must be filed indefinitely in the person's file, in a secure and confidential manner.

Evaluation sessions are also a good opportunity to review certain aspects of the role and to revisit relevant points in the Code of Ethics and Conduct.

Step 10 – Follow-up with participants and Feedback

It is not sufficient to have met the nine (9) previous steps to trust that this ensures a safe environment. It is vital to follow up with the beneficiaries of the pastoral ministry (or their families) and the personnel who minister there.

Regular meetings or telephone calls with the participants and their families are a good way to make sure that the program is running well and that the service provided is of good quality. These meetings will also act as a deterrent in the case of any individual who might otherwise cause harm to someone and not be detected. It is vital that parishes make it known to all their staff that a regular supervision and evaluation procedure, including regular contact with participants and their families, is part of their management procedures and should not be seen as a personal threat.

In situations where an employee or volunteer is frequently alone with a participant, it would be appropriate for the supervisor (or another person) to make occasional unannounced visits.

Remember that the volunteer's reward is in the recognition and gratitude they receive. Even if, in the Church, we give generously without expecting anything in return, the interest you take in the volunteer and his or her work, even during Stages 9 and 10 of the screening process, shows the importance and appreciation you have for your workers.

Note: The appendices referred to in the policy are listed in the separate document "Diocesan Policy on Responsible Pastoral Ministry - Implementation Tools". To obtain this document, please contact the Diocesan Responsible Pastoral Ministry Service:
pastoresponsable@diocesemontreal.org