



Diocese of  
Green Bay

# **Office of Safe Environment Annual Parish Survey**

# **DIOCESE OF GREEN BAY**

**2023-2024 Safe Environment Information for the annual  
United States Conference of Catholic Bishops (USCCB)  
Audit**

## **PARISH**





Diocese of  
Green Bay

# **Office of Safe Environment**

**Courtney Coopman - Diocesan Assistance  
Coordinator**

**Debbie Knaus - Safe Environment Assistant**

# Office of Safe Environment

As you read through the following information regarding the annual safe environment survey, please send an email to [dknaus@gbdioc.org](mailto:dknaus@gbdioc.org) with any questions you may have.

Policy and Resource information pertaining to the Office of Safe Environment can be found by logging into [www.gbdioc.org](http://www.gbdioc.org), and hovering over the “Protecting Our Children” tab across the top.

# Safe Environment Survey

## Bullet Points

- Parish and school survey must be kept separate.
- Audit period = July 1, 2023 to June 30, 2024.
- Audit focuses on ALL employees paid in the audit period.
- Audit focuses on ONLY those volunteers overseeing minors (under age 18) during the audit period.
- Must complete the survey online. Parish Worksheet is for your use only.
- Must sign and return Signature Page.
- Explanation of differences must be submitted with the Signature Page. We are required to explain to Bishop Ricken and the USCCB any differences.
- Must send spreadsheet of employees and volunteers reflected in numbers reported under VIRTUS and Background Check.
- Survey online submission deadline is **Friday May 17, 2024.**
- Questions to Deb Knaus 920-272-8198 or [dknaus@gbdioc.org](mailto:dknaus@gbdioc.org).

# Safe Environment Survey

## Bullet Points (cont.)

- The Safe Environment survey is fulfilling the requirements of the USCCB Charter for the Protection of Children and Young People Articles 12 and 13.
- On April 19<sup>th</sup>, you will be receiving from Alchemer (Survey Gizmo) the link to complete the online survey. Please look for this email coming from Alchemer. It will not be coming from the Office of Safe Environment. The Office of Safe Environment will send a notification to you that the link is being sent from Alchemer. If you don't receive the link or accidentally delete the link let [dknaus@gbdioc.org](mailto:dknaus@gbdioc.org) know to resend the link. The link is specific to each parish.
- You have the ability to download the survey once you have completed it. Please make a copy and keep for your records. Please indicate parish and location, have the required people sign the document, and send the Signature Page, along with your spreadsheet to the Office of Safe Environment. You will again be required to submit a spreadsheet of all employees paid and all volunteers who ministered to children in the audit timeframe of 7-1-2023 to 6-30-2024.
- Please separate your employees from your volunteers.
- Please submit your list in alphabetical order.
- You can Scan and email the Signature Page and your spreadsheet.

# Safe Environment Survey

## Bullet Points (cont.)

### Guidance for completing the survey:

- Youth employees or youth volunteers under the age of 18 are not counted in the numbers because they are the population we serve.
- People that do not have a social security number, can still submit a background check using all 9's, however a limited background check will be performed. They are considered Supervised Volunteers and are still counted in the numbers. In order to be counted they must have their references checked, have a signed Supervision Agreement in place, e-signed the Diocesan Code of Pastoral Conduct for Volunteers and have completed the safe environment training, Protecting God's Children. All paperwork is maintained in a secure file at the location. A copy of the signed Supervision Agreement needs to be sent to the Office of Safe Environment to be kept on file for the auditors.

# **Safe Environment Survey**

## **Bullet Points (cont.)**

- **Because youth under the age of 18 cannot take the VIRTUS safe environment training, if as part of their helping out or role they have contact with children, they must always be in the presence of a diocesan approved background checked and VIRTUS safe environment trained adult.**
- **The Youth Volunteer paper application can be found on the diocese website under the tab Protecting Our Children > Safe Environment Forms and Manuals.**
- **The Youth Employee procedure and Authorization for Consumer Report document can be found on the diocese website under the tab called Protecting Our Children > Safe Environment Forms and Manuals.**
- **Supervised Volunteer information can be found on the diocese website under the tab Protecting Our Children > Diocesan Policies and Resources. The printable document can be found under “Safe Environment Policy on Supervised Volunteers”.**



# **Safe Environment Survey**

## **Bullet Points (cont.)**

- **We ask that locations not be combined unless all employees and RE programs are located at one central location.**

### **Examples:**

- **The LoSEC is responsible for two parishes. The RE programs are held at both locations. Please submit individual surveys for each location.**
- **Two or more parishes have employees at all parishes but the RE program is done at one parish. Please submit individual surveys for each location.**

# **Safe Environment Survey Bullet Points (cont.)**

- **As a LoSEC you are a required reader of the monthly VIRTUS bulletins.**
- **The Our Promise to Protect (OPTP) is for employees. The Diocesan Code of Pastoral Conduct is for Volunteers. Both the Our Promise to Protect and the Diocesan Code of Pastoral Conduct must be e-signed yearly.**

# **Safe Environment Survey**

## **Bullet Points (cont.)**

- **You can run reports out of VIRTUS to show the status of those people that are required monthly VIRTUS bulletin readers. Make sure the correct email is listed on their account otherwise they won't receive the notification from VIRTUS that a new bulletin is available.**
- **Page 7 of the Our Promise to Protect employee code of conduct lists the roles that are required monthly VIRTUS bulletin readers.**
- **Priests and Deacons are required VIRTUS bulletins readers and are managed through the Office of Safe Environment. Please do not change information on Priests or Deacons in VIRTUS.**
- **Yearly we must ensure that everyone knows who is mandated to report abuse and how to report abuse. The Reporting Abuse brochure can be downloaded from the website under the tab Protecting Our Children > Diocesan Policies and Resources.**

# Section 1 VIRTUS Safe Environment Training Parish



## Safe Environment Training for Parish Employees

*Paid parish employees (do not count priests or deacons).*

*Anyone on the parish payroll needs to be counted regardless of hours worked.*

*All parish employees, are required to complete VIRTUS safe environment training regardless of position or job title, prior to the first day of employment.*

Total Parish Employees	Number of Parish Employees VIRTUS Trained
<input type="text"/>	<input type="text"/>

# **Section 1 VIRTUS Safe Environment Training Parish (cont.)**

- The total Parish Employees must equal the Number of Parish Employees VIRTUS Trained. If not, must provide a documented explanation sent along with the Signature Page. You have until June 30, 2024, to ensure all employees are VIRTUS trained. We ask that discrepancies are addressed prior to June 30, 2024.**
- Priests and Deacons are counted through the Chancery Office. DO NOT INCLUDE IN YOUR NUMBERS OR INFORMATION. Please do not change information in VIRTUS on Priests or Deacons.**
- Religious Order Sisters employed at the parish must have VIRTUS training. Religious Order Sisters are counted as employees by the parish.**
- Counting example – parish secretary retires in December and record is archived. Needs to be counted for the survey as the parish secretary was employed in the audit timeframe of 7-1-2023 to 6-30-2024. New parish secretary hired in February. Also needs to be counted for the survey as the new parish secretary is also employed in the audit timeframe of 7-1-2023 to 6-30-2024.**

# Section 1 VIRTUS Safe Environment

## Training Parish

### Safe Environment Training for all Parish Volunteers overseeing minors (under age 18)

*All parish volunteers who have had contact overseeing minors in the current audit year, July 1, 2023, to June 30, 2024.*

*All parish volunteers who have had contact overseeing minors in the current audit year as part of their volunteer duties are required to complete VIRTUS training **prior** to any volunteer duties.*

<b>Total Parish Volunteers</b>	<b>Number of these Parish Volunteers who are VIRTUS Trained</b>

# Section 1 VIRTUS Safe Environment Training Parish (cont.)

- **Minors are defined as under the age of 18. Overseeing pertains to a volunteer in a role where children under the age of 18 are present as part of the function of the role/ministry.**
- **Total Parish Volunteers must equal The Number of Parish Volunteers who are VIRTUS safe environment trained. If not, must provide a documented explanation sent along with the Signature Page. You have until June 30, 2024, to ensure all volunteers are VIRTUS safe environment trained. We ask that discrepancies are addressed prior to June 30, 2024.**
- **Example- RE teacher volunteering in the fall session and then family is relocated, and record is archived. Must count the RE teacher as a volunteer in the audit year. New RE teacher hired for spring session must be counted as a volunteer in the audit year.**
- **Youth volunteers under the age of 18 are not counted as volunteers. Because youth volunteers under the age of 18 cannot take VIRTUS safe environment training, if as part of their helper duties they have contact with children, they must always be in the presence of a diocesan approved background checked and VIRTUS safe environment trained adult.**
- **Supervised Volunteers, people that are unable to obtain a Social Security number, are required to complete a limited background check and complete the online VIRTUS safe environment training, Protecting God's Children. They are included in the Volunteer numbers.**
- **Religious Order Sisters volunteering at a parish must have VIRTUS safe environment training. They are counted in the volunteer numbers.**

# Section 2 Background Checks

## Parish

### Background Checks for Parish Employees

*Paid parish employees (do not count priests or deacons).*

*Anyone on the parish payroll during the audit period needs to be counted regardless of hours worked.*

*All parish employees are required to have a Diocese of Green Bay approved background check prior to confirmation of employment.*

<b>Total Parish Employees</b>	<b>Number of Parish Employees with a Diocese of Green Bay Approved Background Check</b>



# **Section 2 Background Checks**

## **Parish (cont.)**

- **Total Parish Employees must equal the Number of Parish Employees with a Diocese of Green Bay Approved Background Check. If not, must provide a documented explanation sent along with the Signature Page. You have until June 30, 2024, to ensure all employees have a completed and approved background check. We ask that discrepancies are addressed prior to June 30, 2024.**
- **Youth employees under the age of 18 are not counted as employees. DO NOT INCLUDE IN YOUR NUMBERS OR INFORMATION. Because youth employees under the age of 18 cannot take VIRTUS safe environment training, if as part of their role they have contact with children, they must always be in the presence of a diocesan approved background checked and VIRTUS safe environment trained adult. New with the VIRTUS platform is a safe environment training for under 18-year-old employees called Healthy Relationships for Teens however they still must be in the presence of an approved adult.**
- **Priests and Deacons are counted through the Chancery Office. DO NOT INCLUDE IN YOUR NUMBERS OR INFORMATION. Please do not change VIRTUS information on Priests or Deacons.**
- **Religious Order Sisters employed at the parish must have a background check. Religious Order Sisters are counted as employees by the parish.**

# Section 2-Background Check Parish

## Background Checks for Parish Volunteers overseeing minors (under age 18)

*Must count all parish volunteers who have had contact overseeing minors in the current audit year July 1, 2023, to June 30, 2024.*

*All parish volunteers who have had contact overseeing minors in the current audit year as part of their volunteer duties are required to have a Diocese of Green Bay approved background check **prior** to volunteering.*

<b>Total Parish Volunteers</b>	<b>Number of Parish Volunteers with a Diocese of Green Bay Approved Background Check</b>

# **Section 2-Background Check Parish (Cont.)**

- **The Total Parish Volunteers must equal the Number of Parish Volunteers with a Diocese of Green Bay Approved Background Check. If not, must provide a documented explanation sent along with the Signature Page. You have until June 30, 2024, to ensure all volunteers have a completed and approved background check. We ask that discrepancies are addressed prior to June 30, 2024.**
- **Youth volunteers under the age of 18 are not counted as volunteers.**
- **Supervised Volunteers, people that are unable to obtain a Social Security number. They must complete a limited background check, have their references checked, e-sign the Diocesan Code of Pastoral Conduct and complete safe environment training, Protecting God's Children. Supervised Volunteers must be counted as a volunteer. A copy of the signed Supervisor agreement must be sent to the Office of Safe Environment.**
- **Religious Order Sisters volunteering at the parish must have a background check. Religious Order Sisters are counted as volunteers by the parish.**

# Section 3 Reporting Abuse

## Parish

*Parish Employees and Parish Volunteers are to be informed at least yearly of how to report an incident or suspicion of abuse.*

<b>Parish Employees</b>	<b>Parish Volunteers</b>
Date(s) information was reviewed, posted, sent, etc.: ■	Date(s) information was reviewed, posted, sent, etc.: ■

# **Section 3 Reporting Abuse Parish (cont.)**

- **The Diocesan Code of Pastoral Conduct for volunteers and the Our Promise to Protect for employees is reviewed and e-signed yearly to insure everyone clearly understands the expectations regarding appropriate boundaries and for reporting abuse.**
- **Once a quarter the information of how to report abuse is distributed via Parish Pages. We encourage you to make sure this appears in your Sunday bulletin at least once a quarter.**

# Section 4 Safe Environment Training for Children Parish

*The Diocese of Green Bay requires that religious education programs devote at least one (1) class to Safe Environment Training for Children. Lessons Plans and Resources can be found on the diocese website.*

*Must provide the date(s) of when the curriculum was presented*

**Date(s) curriculum presented: \_\_\_**

*Must answer Yes or No if the program is kept on file at the parish*

**Program(s) needs to be kept on file at the parish.**

**Is the program(s) kept on file?**

**YES**

**NO**

# Section 4 Safe Environment Training for Children Parish (cont.)

(A) Total Children Enrolled	(B) Number of Children Trained and were physically present at the session(s)	(C) Number of Children Absent for Training and materials sent home	(D) Number of Children Opted Out (if any)
■	■	■	■

*The Total Children Enrolled = The Number of Children Trained + The Number of Children Absent + the Number of Children Opted Out.*

*In other words-*

*Column (A) must be the same number as column (B), (C) and (D) **combined**. If not a documented explanation must be sent with the Signature Page.*

# **Section 4 Safe Environment Training for Children Parish (cont.)**

The *Opt Out form* is used to substantiate that all children in a program are accounted for regarding Safe Environment Training, that such training has been offered to them and that the parent(s)/guardian(s) chose to decline it. The annual USCCB Audit requires an *Opt Out form* for every child whose parent(s)/guardian(s) decline to have their child attend Safe Environment Training provided by the parish.

The parent(s)/guardian(s) of the child completes the form and returns it to the parish office. This form is to remain in the child's permanent religious education file. A Copy of the *Opt Out form* must be forwarded to the Office of Safe Environment.

Office of Safe Environment  
P.O. Box 23825  
Green Bay, WI 54305-3825



# **Section 4 Safe Environment Training for Children Parish (cont.)**

- **The Opt Out Form can be found online. On the diocese website under the tab Protecting Our Children > Lesson Plans and Resources for Children. The Opt Form along with Lesson Plans and FAQs can be found here.**
- **In September 2016, Safe Environment, through a grant from the Catholic Foundation, purchased the VIRTUS Children's safe environment Lesson Plans. All safe environment training for children should be utilizing the VIRTUS Children's safe environment Lesson plans. There is also a link on the web page that will take you to additional lesson plans and resources that can be used to supplement the VIRTUS Children's safe environment Lesson Plans. Please ensure your RE leaders are aware of where to find the VIRTUS Children's safe environment Lesson Plans.**

# **Signature Page Parish**

***Once the information has been compiled and entered online, both the person responsible for completing the Survey online and the Pastor, Pastoral Leader, or Deacon, responsible for reviewing the Survey, must sign and send the Signature page to the Office of Safe Environment along with the required employee and volunteer spreadsheets. The online survey can be downloaded and then signed or the Signature Page at the back of the Parish Worksheet can be used for signatures.***

***The signature page and required spreadsheet of employees and volunteers can be scanned and emailed to:***

***Office of Safe Environment  
P.O. Box 23825  
Green Bay, WI 54305-3825***



THANK YOU  
FOR ALL THAT  
YOU DO!