

**Volunteer Screening Manual**

**Section Six**  
**Selection Process**

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## **SECTION SIX: SELECTION PROCESS**

### **Step Four: Forms**

A Volunteer Information Form is to be completed for all ministry positions. The completion of this form is intended to ensure that adequate records are kept. This form collects such basic information as the individual's name, address, phone number, and any previous experience, as a volunteer. This form provides the screening committee with the necessary permissions, when required, to conduct reference checks and police record checks. For low risk positions, only basic information is to be recorded.

For low risk positions, the ministry leader or coordinator is responsible for providing the volunteer with a position description and for the distribution and collection of the Volunteer Information Form 1010 page 1 and page 4 of the Volunteer Agreement. This form is then to be given to the pastor or the Parish Screening Committee and is to be kept in a confidential file.

For medium and high risk positions, the pastor or the Parish Screening Committee is responsible for providing the volunteer with a position description and for the distribution and collection of the Volunteer Information Form 1010 and page 2, References. This form is to be kept in a confidential file. Members of the screening committee are then to follow up by conducting an interview, completing the reference checks and, when applicable, completing a police records check, page 3. In order to ensure that all the information has been gathered a checklist is provided on page 3 of the Volunteer Information Form 1010.

### **Summary**

- A Volunteer Information Form (pages 1&4) is to be completed by all regular volunteers in low risk positions (excluding special event volunteers or occasional volunteers).
- A Volunteer Information Form (pages 1/2/4), a Reference Form, Consent for Reference Checks Form and the Volunteer Agreement are to be completed by all regular volunteers in medium risk positions.

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- Volunteer Information Form (pages 1-4), a Reference Form, Consent for Reference Checks Form, Volunteer Agreement and Consent for Police Records Check Form are to be completed by all regular volunteers in high risk positions.

## **Step Five: Interviews**

The interview is an extremely important step in the screening process. The interview provides an opportunity to talk to the potential volunteer about his or her background, talents, skills, interests, and availability. The interview also provides an opportunity to explore any doubts that may arise about a person's suitability for a given ministry. An interview helps to determine the suitability of the volunteer for a particular ministry. During the interview, the responsibilities, and the expectations of the medium or high-risk position are to be outlined. *Be well prepared in order to be thorough and make the best use of time. An interview need not be long or difficult.*

Instructions regarding interviews (to be conducted by at least two people):

- establish a safe environment, free of distractions and interruptions
- explain briefly the reason for the interview
- explain the interview process to the applicant and inform the applicant that notes are being taken
- describe the ministry and its expectations using the position description
- document the applicant's responses and keep them on file  
(Form1030/1040/1050/1060).
- ask all applicants the same basic questions to maintain consistency.

Interview questions are to encourage responses that help to evaluate:

- relevant work or volunteer related experiences
- ability to work with others
- integrity
- suitability
- initiative and judgment.

The interview is to include questions directly related to risk concerns, such as individual's attitude and interpersonal style regarding children or vulnerable adults.

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## Summary

- An interview provides important information about the applicant and provides an applicant with an understanding of the responsibilities and expectations of a particular ministry.
- Interviews are required for all medium and high-risk positions.

## Step Six: Reference Checks

Reference checks are to be conducted for all those who volunteer in medium and high-risk positions. Before proceeding, obtain the written permission of the applicant. References may provide further information about the background and skills of the applicant as well as an outside opinion on the suitability of the person for ministry. Reference checks may be the most effective screening step that is undertaken during the screening process. No exceptions are to be made.

## **Instructions regarding Reference Checks:**

- obtain a signed release form before proceeding (see Volunteer Information Form 1010, page 2.)
- ask the applicant to notify the reference that his or her name has been given as a reference
- initiate the conversation with a brief introduction and explain the reason for the inquiry
- verify that the person being addressed is the one whose name is presented as a reference
- upon mentioning the name of the applicant, listen carefully to the tone of the response
- inform the reference that their responses will not be made available to the volunteer without their consent
- ask the person if he or she is in a confidential setting and is able to speak freely
- describe the ministry position
- ask open-ended questions that require more than a one word response

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- maintain a written record of the interview using the record of reference check form (Form 1020) and save this information in the applicant's confidential file
- conduct more than one reference check in order to obtain a broader perspective
- the reference question form can be mailed to the reference with instructions to return it to the screening committee
- the information a reference supplies is not to be shared with the volunteer without the permission of the reference.

## Summary

- All medium and high-risk positions require reference checks.
- Obtain written permission of the applicant before proceeding with a reference check.
- Reference checks provide an important source of information about an applicant.

## Step Seven: Police Records Checks

A Police Records Check is required for all positions deemed high risk. Only the applicant, the pastor and the screening committee may access the information obtained from a Police Records Check.

**The parish shall keep a copy of the Enhanced Police Information Check (EPIC). The Enhanced Police Information Check (EPIC) is to be kept in a separate envelope within the volunteer's file.**

If a conviction appears, the pastor is to approach the applicant and ask that he or she provide details concerning the crime committed. A conviction does not automatically preclude an applicant from being a volunteer. This decision belongs to the discretion of the pastor.

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The limitations of Police Records Check include:

- reliable only up to the day conducted (a very recent conviction may not be cited)
- time lags arise when sending records from one country to another
- the individual may use an alias
- the individual may have obtained a pardon with such information no longer appearing in the person's file
- the information may not be available if a conviction occurred while an individual was a youth and within the scope of the Young Offenders Act

## **Summary**

- All volunteers in high risk positions are required to provide an Enhanced Police Information Check (EPIC).
- The pastor is to determine whether or not an individual with a conviction may serve as a volunteer.

## **Record Keeping and Confidentiality**

A volunteer has the right to know and to expect that the sharing of personal information remains confidential. All information gathered either in writing or verbally must always be kept in the strictest confidence. Only the applicant, the pastor and the parish screening committee members are to have access to the information gathered for the purpose of screening. A volunteer may examine his or her own file when arrangements have been made with the screening committee and may insert documentation of his or her own. The only information not available to the volunteer is the Reference Check. These can only be made available with the permission of the reference. If the volunteer makes a request to see his or her file, the Reference Check Forms are to be removed first. The file remains the property of the parish and Diocese.

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A volunteer's file is to be kept in a secured filing system and is to include the following documents:

- Volunteer Information Form
- Interview notes
- Reference Check Forms or letters
- Police Records Check in a sealed envelope
- Screening checklist Volunteer Screening Form (page 3)
- Supervision and evaluation notes

Additional information may include:

- Letters of praise/awards
- Certificates of training
- Performance evaluations
- Information submitted by the volunteer

## **Summary**

- Information about volunteers is to be held in confidence.
- Files are to be kept secure and updated annually while a volunteer is in a ministry position.
- Files of volunteers that have ceased in ministry are to be pulled from the active files, dated, and stored in an inactive file. This record is to be maintained in Perpetuity (see Policy #37).

## **Guidelines for Not Selecting Applicants**

**Grounds for not selecting applicants for a volunteer position include:**

- inability to fulfil the time commitment of the position
- lack of skills and qualifications required as outlined in the position description

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- the pastor or a screening committee has information that would prevent the applicant from participating, such as a negative interview and/or several negative responses from the reference checks
- the applicant has information on their Police Records Check directly relevant to the position to which they have applied
- the applicant refuses to participate in the screening process.

The information that a volunteer has not been selected must never be made public. If there is any uncertainty about not selecting a volunteer, the pastor makes the final decision.

## Notifying unsuccessful volunteer applicants

- When the screening committee believes that a volunteer is not suitable for a ministry position, they must:
  - report their findings to the pastor and provide him with all relevant information.
- Prior to calling each unsuccessful applicant, review the applicant's file for their positive qualifications as well as those areas that need further development. Whenever possible suggest an alternate position, for which they may wish to volunteer.
- Either the applicant or the pastor or the screening committee will inform the ministry leader that he or she will not be volunteering. The ministry leader is not to be told of the details. This information is confidential.

## Criteria for Removing a Current Volunteer

- The volunteer poses a danger or threat to the well being of other volunteers or to the person whom he or she ministers.

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- The volunteer is under the influence of drugs or alcohol while performing his or her duties.



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- The volunteer is deemed unsuitable for a position from information acquired through a Police Records Check.
- The volunteer has stolen or damaged property, misused funds, equipment, or materials.
- The volunteer is unreliable or incapable of performing his or her duties.
- The volunteer has disregarded the policies and procedures of his or her position.
- The volunteer refuses to submit to screening procedures, either initially or ongoing.

## **Procedure for Reassigning or removing a Current Volunteer**

The removal of a current volunteer is only to be done as a last resort when all other appropriate measures have been exhausted. The pastor is to speak in person to the volunteer. The primary emphasis when reassigning or removing a volunteer is based on the requirements of the ministry, for example: the ministry is not suited to your skills, gifts, or talents.

- The pastor meets with the volunteer to discuss the problem and places a record of the discussion in the volunteer's file.
- If the volunteer has been unclear as to the scope of his or her activities and responsibilities, reference should be made to the position description he or she received prior to undertaking his or her duties.
  
- Emphasize the importance of a proper match between the skills of the volunteer and the requirements of the ministry.
- If after repeated consultation, the problem still exists the volunteer may be encouraged to consider a different position.
- If the problem continues to exist, the volunteer is to be removed.

If there is any indication that a volunteer may pose a danger to others, the

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ministry leader or the parish screening committee member must notify the pastor immediately. The pastor is responsible for asking the volunteer to leave. This information is confidential.

**If a volunteer is removed, the parish will inform the Diocesan Screening Coordinator and send an Incident Report (Form 1190) to the Chancery Office.**