



Lay Authorisation and Clearance Process Overview

Introduction

Under the Victorian Reportable Conduct Scheme and Victorian Organisational Duty of Care legislation, and indirectly through the Victorian, NSW and National child safe/safe church standards, all organisations and organisational leadership MUST take all steps possible to remove or reduce the risk of abuse in the organisation or by leaders/workers of the organisation.

To comply with these requirements the Diocese of Wangaratta has reviewed its lay authorisation model and recruitment and leadership systems, with some changes being necessary. The new Lay Authorisation Guidelines apply to all lay roles in the Diocese, including lay administrative and governance roles in addition to the licensed lay ministry roles. The new Guidelines relate primarily to authorisation in the safe church context, with the focus on clearance processes and appropriate documentation of appointments.

The Guidelines do not seek in any way to override the rights of parishes to elect or appoint certain roles and this has been recognised in the review of lay roles (Lay Authorisation Guidelines, Appendix One). However, parish processes in relation to these roles must be consistent with the documentation and clearance processes as set out in the Diocese's Lay Authorisation Guidelines and associated safe church and professional standards material.

This document provides an overview of the authorisation and clearance processes as they apply to licensed lay ministry roles, elected officebearers and other locally appointed roles. The processes outlined for each reflect the usual processes for nominating, electing or appointing people to such roles but incorporate the revised documentation as required to comply with duty of care and other legislative requirements.

Position Descriptions

Position Description templates are available for a number of roles and must be customised by the responsible ministry unit (parish or diocese) for each appointment.

Where a Position Description is available for a particular role, this must be provided to the individual being appointed to the role and actioned as follows:

Clergy PDs must be signed by the member of clergy and endorsed by the Bishop, with signed copies to be provided to the member of clergy and stored securely by the Registrar.

Parish Office Holder PDs – Parish Councillors and Churchwardens will have a separate Declaration that must be signed and distributed in accordance with the Parish Administration Act S. 79 and 96.

Other Lay Role PDs must be signed by the appointee and appropriate church leader (as indicated on the PD), with a signed copy being securely stored by the relevant ministry unit (parish or diocese) and a copy provided to the appointee.

Submission Forms

There are two new forms relating to the lay authorisation and clearance process:

- Each individual being appointed to any lay role or roles must complete the **Acknowledgement of Lay Appointment, Election or Nomination** form. Only one form is required for each person covering all roles that person is appointed or elected to, unless additional appointments are made at a later time.
- Each parish must complete the **Lay Authorisation and Clearance Submission** form. Only one form is required for each parish for all the lay roles being filled, unless additional appointments are made at a later time.

For a listing of all the forms and resources supporting this process refer to page 6 of this document.

Process for Lay Ministry (Licensed) Roles

- The priest¹ and member² of the church agree to the role/s appropriate for the individual.
- The priest and individual complete the Acknowledgement of Lay Appointment, Election or Nomination form.
- The priest submits nominations to Parish Council for endorsement.
- Endorsed individuals obtain/complete any clearance documentation applicable to their role/s and provide this to the priest or Parish Safe Church Officer.
- The priest and a Parish Council representative complete the Lay Authorisation & Clearance Submission form, and confirm receipt of all clearance documentation required for each individual.
- The priest or Parish Safe Church Officer submit copies of the required clearance documentation, either (as appropriate):
 - Online – enter the details and scanned copies (as appropriate) of required clearance documentation onto SMO (the Diocesan clearance online records system³); or
 - Direct – by providing copies of all required clearance documentation to the Registrar with the Submission form (see below)
- The completed Lay Authorisation & Clearance Submission form is provided to the Diocesan Registrar (with copies of all documentation if not already submitted online through SMO).
- Following verification of successful safe church / professional standards clearance, individuals will be endorsed or licensed by the Bishop (as applicable).

The above process applies to the following licensed roles:

- Lay reader
- Lay preacher
- Lay minister
- Worship leader
- Lay chaplain
- Adult bible study leader
- Crucifer / Server / Acolyte
- Eucharistic assistant
- Pastoral worker/visitor
- Nursing home/hospital visitor
- Home communion
- Spiritual director/advisor
- Verger
- Children’s ministry coordinator
- Youth leader
- Playgroup coordinator
- School ministry / RE instructor
- Diocesan safe church officer
- Parish safe church officer

It also applies where a position requires endorsement by the Bishop. This includes:

- op shop coordinators
- safe church committee members
- vocational discernment panel members.

¹ “Priest” refers to the Rector, Priest in Charge or long term locum of the parish, or the Diocesan Archdeacon.

² “Member” refers to a congregant who has been associated with the parish for sufficient time to be eligible for appointment or election to a lay position. For most lay ministry and lay administrative roles this is at least 6 months.

³ The Diocese is implementing a secure electronic record keeping system in 2018 better manage clearance requirements. This is called Safety Management Online (SMO), through ChildSafe Limited.

Process for Elected or Appointed Officeholders

- Nominations called and submitted in accordance with Parish Administration Act.⁴
- Clearance process commenced.⁵
- Election/s held in accordance with usual processes (as per the PAA).
- Elected/appointed individuals complete the Acknowledgement of Lay Appointment, Election or Nomination form, including the declaration of churchwardens/parish councillor (as relevant), and obtain/complete any clearance documentation required for their role/s.
- Elected individuals provide relevant clearance documentation to the priest or Parish Safe Church Officer.
- The priest and a Parish Council representative complete the Lay Authorisation & Clearance Submission form, and confirm receipt of all clearance documentation required for each individual.
- The priest or Parish Safe Church Officer submit copies of the required clearance documentation, either (as appropriate):
 - Online – enter the details and scanned copies (as appropriate) of required clearance documentation onto SMO (the Diocesan clearance online records system⁶); or
 - Direct – by providing copies of all required clearance documentation to the Registrar with the Submission form (see below)
- The completed Lay Authorisation & Clearance Submission form is provided to the Diocesan Registrar (with copies of all documentation if not already submitted online through SMO).
- Following verification of successful safe church / professional standards clearance, Parish Council issue letter/s of appointment to elected individuals.

The above process applies to the following roles:

- Warden
- Parish councillor
- Parish secretary
- Parish treasurer
- Other elected officeholder
- Parish Safe Church Officer

⁴ Individuals must be parishioners of at least 12 months' standing to be eligible for election or appointment as a parish councillor or churchwarden, and at least 6 months' standing in order to be eligible for appointment to other roles.

⁵ The appointee cannot commence in the role until the relevant clearance process has been completed so all nominated persons are encouraged to start the process prior to elections being held.

⁶ The Diocese is implementing a secure electronic record keeping system in 2018 better manage clearance requirements. This is called Safety Management Online (SMO), through ChildSafe Limited.

Process for Other Parish Appointments

- Nomination or recruitment process occurs (as appropriate).
- The priest and individual complete the Acknowledgement of Lay Appointment, Election or Nomination form.
- The priest submits recommended appointments to Parish Council for endorsement.
- Endorsed individuals obtain/complete any clearance documentation and provide this to the priest or Parish Safe Church Officer.⁷
- The priest and a Parish Council representative complete the Lay Authorisation & Clearance Submission form, and confirm receipt of all clearance documentation required for each individual.
- The priest or Parish Safe Church Officer submit copies of the required clearance documentation, either (as appropriate):
 - Online – enter the details and scanned copies (as appropriate) of required clearance documentation onto SMO (the Diocesan clearance online records system⁸); or
 - Direct – by providing copies of all required clearance documentation to the Registrar with the Submission form (see below)
- The completed Lay Authorisation & Clearance Submission form is provided to the Diocesan Registrar (with copies of all documentation if not already submitted online through SMO).
- The Lay Appointment Clearance Submission form and all clearance documentation are provided to the Registrar, for confirmation of clearance.
- Letter/s of appointment issued by the Parish Council.

The above process applies to the following roles:

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| • Intercessors | • Bible readers | • Sidesperson / welcomer |
| • Community meals coordinator | • Catering coordinator | • Event coordinator |
| • Music leader | • Choir coordinator | • Choir member / musician |
| • Stipendiary music director | • Stipendiary musician | • Op shop worker |
| • Community meals worker | • Catering worker | • Event worker |
| • Bus driver | • Offertory / collection counter | • Guild official |
| • Communications officer | • Volunteer coordinator | • Office administration / reception |
| • Groundskeeper / landscaper | • Property / maintenance | • Cleaner |
| • Synod representative | • General Synod representative | • Nominators |

⁷ The appointee cannot commence in the role until the relevant clearance process has been completed so all nominated persons are encouraged to start the process early.

⁸ The Diocese is implementing a secure electronic record keeping system in 2018 better manage clearance requirements. This is called Safety Management Online (SMO), through ChildSafe Limited.

Process for Diocesan Elected/Appointed Roles

- Nomination, election or recruitment process occurs (as appropriate).
- The Registrar and individual complete the Acknowledgement of Lay Appointment, Election or Nomination form.
- Elected or appointed individuals obtain/complete any clearance documentation and provide this to the Registrar.
- The Registrar completes the Lay Authorisation & Clearance Submission form, and confirms receipt of all clearance documentation required for each individual.
- The Registrar submits copies of the required clearance documentation, either (as appropriate):
 - Online – enter the details and scanned copies (as appropriate) of required clearance documentation onto SMO (the Diocesan clearance online records system⁹); or
 - Direct – securely filing hard copies of all required clearance documentation with the Submission form.
- Letter/s of appointment issued by the Registrar.

The above process applies to the following roles:

- General Synod Representatives
- Provincial Council Reps
- Chancellor
- Treasurer
- Cathedral Canons
- Bishop in Council Members
- Advocate
- Registrar
- Trustees
- BiC Committee Members
- Deputy Advocate
- Diocesan non-ministry appointments (church workers)

⁹ The Diocese is implementing a secure electronic record keeping system in 2018 better manage clearance requirements. This is called Safety Management Online (SMO), through ChildSafe Limited.

Summary of Lay Authorisation / Clearance Resources

Resource Title	Document Type	For Use By
Lay Authorisation Guidelines	Guideline/Policy	All
Summary of Checks and Screening	General Resource	All
Guidelines for Submitting Requests for Exemption from Clearance or Certification Requirements	Guideline	Ministry Units (parishes/diocese)
Lay Authorisation and Clearance Process Overview (<i>this document</i>)	General Resource	All
Safe Ministry Questionnaire	Form	Individuals
Acknowledgement of Lay Appointment, Election or Nomination	Form/Checklist	Individuals
Lay Authorisation and Clearance Submission	Form	Ministry Units (parishes/diocese)
Position Descriptions	Guideline - Role Specific	Ministry Units (parishes/diocese) Individuals in Specified Roles
Declaration of Churchwarden	Form	Individuals (Specific Role)
Declaration of Parish Councillor	Form	Individuals (Specific Role)
Fact Sheet – Verifying Working with Children Checks	General Resource	Ministry Units (parishes/diocese)
Fact Sheet – Lay Authorisation and Clearance Resources	General Resource	All
Parish Office Holders Contact Information	Form	Parishes
Parish Councillors Contact Information	Form	Parishes
Parish Centres Contact Information	Form	Parishes
Nomination for Election of a Parish Councillor	Form	Parishes
Nomination for Election of a Churchwarden	Form	Parishes