## Contents – last updated April 21, 2020

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Administrative

GENERAL

2004 Accreditation
All schools in the Diocese are to be appropriately accredited. High schools are to be accredited by Diocesan-approved accrediting agencies. Elementary schools are to be accredited through the Michigan Non-public Schools Accrediting Agency.

A school may not eliminate accreditation.

A school that cannot meet accreditation standards must notify the Office of Catholic Schools, to review the situation. Continued failure to achieve accreditation may result in intervention or action by the Diocese.

2010 Media Relations and Promotion
The principal may approve promotional activities that utilize students to further the work of the school, or a non-profit community-wide service agency, or promote activities in the general public interest.

Such activities and promotions shall be consistent with the tenets of the Catholic faith and shall not be used for personal promotion or exploitation of students or staff. Such promotional activities shall not be engaged in on behalf of for-profit organizations, or non-profit organizations that are not focused on charitable service to the community.

The appropriate media relations/promotions release form must be provided by the school and completed by the parent before the promotional activity takes place.

2011 Political Advertising and Campaigning
School buildings, property, and resources are not to be used to endorse candidates for political office or for partisan political purposes. Nothing should be done that could be construed as an endorsement of a particular candidate or ballot issue.

**2014 Vehicle Inspection and Insurance**

Vehicles shall not be used to transport students unless they conform to all appropriate state laws and meet appropriate insurance requirements and liability limits as outlined by the Michigan Catholic Conference.

The state law on school bus transportation can be found at MCL 257.1801 et seq. Passenger vehicles rated for 11 or more (including the driver) may not be used unless contracted for through an outside entity on an occasional basis for transporting students to extra-curricular events. They may not be used for transportation to and from school.

Students shall not be assigned or authorized to transport other students to school sanctioned or related events, regardless of the insurance coverage or permission of parents. The school shall not authorize car-pooling by students to school events. Such car-pooling is a purely private decision of the students and should be done only with full knowledge and consent of all students' parents. The schools assume no responsibility for such personal transportation decisions.

Staff who have any careless or reckless driving citations or convictions, or any citations or convictions relating to alcohol or controlled substance use or possession while driving shall not transport any students (other than their own children).

Students shall not be transported in any vehicle which, is known by the owner or driver to have equipment which is broken or in poor repair which might affect the safety of the passengers.

No individual shall be allowed to drive who is on the Sexual Offenders Registry, or has pending felony charges related to child abuse or criminal sexual conduct.
2017 Administrative Forms/Reports
Each school shall submit all reports required by the state and/or the Diocese on the appropriate report forms and in a timely manner to the State of Michigan (if required by the state) and the Diocese of Grand Rapids.

2018 Standardized Testing
All schools will participate in a standardized testing program as determined by the Diocese. All students will participate in the testing for their grade level unless excused by the Diocese, based on written application and explanation by the building principal as to why testing would not be appropriate.

Reports of the testing will be submitted to the Diocese.

2020 School Calendar
The principal has the responsibility of adhering to the Diocesan school calendar. If there is a need to deviate from this calendar, the principal must request a variance from the Office of Catholic Schools.

2020.5 Sundays (the Lord’s Day) and Holy Days of Obligation
To support full observance of the third commandment* and the teaching of the Catholic Church from the Catechism of the Catholic Church**, Catholic schools within the Diocese of Grand Rapids will make every attempt to refrain from school activities on Sundays and on holy days of obligation. In the rare event that activities may be held on a Sunday or holy day of obligation, provision of Mass or attendance at Mass will be made the highest priority by the adult leaders of that scheduled event (i.e. retreats, service trips, pilgrimages, other school related travel). Students that miss a scheduled school activity on a Sunday due to observance of the Lord’s Day, will not be penalized.

*The Third Commandment
Remember the sabbath day, to keep it holy. Six days you shall labor and do all your work; but the seventh day is a sabbath to the Lord your God; in it you shall not do any work. Ex. 20:8-10; cf. Deut. 5:12-15.
2189 “Observe the sabbath day, to keep it holy” (Deut 5:12). “The seventh day is a sabbath of solemn rest, holy to the Lord” (Ex 31:15).

2190 The sabbath, which represented the completion of the first creation, has been replaced by Sunday which recalls the new creation inaugurated by the Resurrection of Christ.

2191 The Church celebrates the day of Christ’s Resurrection on the “eighth day,” Sunday, which is rightly called the Lord’s Day (cf. SC106).

2192 “Sunday . . . is to be observed as the foremost holy day of obligation in the universal Church” (CIC, can. 1246 § 1). “On Sundays and other holy days of obligation the faithful are bound to participate in the Mass” (CIC, can. 1247).

2193 “On Sundays and other holy days of obligation the faithful are bound . . . to abstain from those labors and business concerns which impede the worship to be rendered to God, the joy which is proper to the Lord’s Day, or the proper relaxation of mind and body” (CIC, can. 1247).

2194 The institution of Sunday helps all “to be allowed sufficient rest and leisure to cultivate their familial, cultural, social, and religious lives” (GS 67 § 3).

2195 Every Christian should avoid making unnecessary demands on others that would hinder them from observing the Lord’s Day.

2021 Patriotism/Holidays

Patriotism is to be encouraged in each school through the recitation of the Pledge of Allegiance and the display of the American flag.

Schools are to conduct an educational program to commemorate and to teach the significance of the following days, on the date indicated or on the immediately preceding or following school day, if school is not in session on the designated day.

Constitution Day (federal) September 17
Columbus Day  
Veteran's Day  
2nd Monday in October  
November 11  
Martin Luther King Day  
3rd Monday in January  
Lincoln's Birthday  
February 12  
Washington's Birthday  
3rd Monday in February

2026 Critical Incidents Crisis Management

All schools will develop crisis response policies. All Schools within the Diocese are provided a Diocese of Grand Rapids Critical Incidents Crisis Management Operational Response Plan to respond systematically and appropriately to a crisis situation. This plan provides basic protocols and procedures to be used by all schools as well as templates that must be updated on a regular basis at the local school level to meet the specific needs of each school location. These procedures should be developed in conjunction with local law enforcement and health department personnel, as appropriate to the nature of the crisis planning. The policies and procedures should be reviewed annually.

Parents and students shall be informed of the crisis response policy and procedures to the extent that disclosure would not impair the effectiveness of the plan, or potentially endanger students during an emergency situation.

2030 Code of Conduct

Each school will have a written code of conduct that reflects the Catholic mission and identity of the school.

The code of conduct shall include, at a minimum, prohibitions on harassment, hazing and bullying of and by students and staff, as well as any conduct on or away from school grounds that negatively impacts the educational environment. Further, the code shall provide for potential consequences for out of school behaviors that are illegal, immoral or inconsistent with standards of behavior expected of a Catholic school student.

This code of conduct shall be disseminated to parents and students at the start of each school year or upon enrollment for those students entering after the start of the school year.
The code of conduct shall be reviewed with the students at or near the beginning of the school year.

**For Schools that participate in Michigan High School Athletic Association (MHSAA)**

Any diocesan high school participating in Michigan High School Athletic Association (MHSAA) accepts the Constitution and By-Laws of MHSAA and adopts as its own the rules, regulations and interpretations (as minimum standards) as published in the current MHSAA handbook as the governing code under which they shall conduct their program of interscholastic athletics and agree to primary enforcement of said rules, regulations, interpretations and qualifications. In addition, schools which host or participate in MHSAA meets and tournaments shall follow and enforce all tournament policies, procedures and schedules.

It is a condition of MHSAA membership that each participating high school board adopt a code of good sportsmanship for its athletes, coaches and spectators, an educational program to promote good sportsmanship and a system of progressive discipline for failures to behave according to the code of good sportsmanship. It is a condition of MHSAA membership that this code of good sportsmanship and/or a separate code of conduct for athletics, must prohibit use of illegal performance enhancing substances and specify a period of ineligibility for students who violate the school’s policy.

**2062 Emergency Closing**

School principals or designees are responsible for the decisions regarding the closing of school in case of emergency, in consultation with the pastor and/or diocesan superintendent.

The principal shall be responsible for having in place an effective communication system for notifying the students, parents and staff when the school is being closed for weather or other emergencies.

In certain circumstances, the diocesan superintendent may deem it necessary to close all or some diocesan schools.
**2063 Severe Weather**

In the event that school is cancelled due to severe or inclement weather, sporting events, practices, and all other school activities will be cancelled and rescheduled when and as possible.

**2070 Fire Safety, Tornado, and Lock Down**

Schools must have policies and procedures in place to ensure that all of the federal, state, and local law requirements are met for fire safety, tornado, and lockdowns.

Drills on the procedures shall be held to familiarize the students with the procedures on the following schedule. NOTE: At least 1 of these drills must be held during lunch or recess period, or when a large number of students are NOT in the classroom.

- **Fire:** 5 per school year
  - (3 before Dec 1, 2 during remainder of year, reasonably spaced)
- **Tornado:** 2 per school year (1 must be in March)
- **Lock Down:** 3 per school year
  - (1 before Dec 1, at least one after Jan 1, reasonably spaced)

**2086 Field Trips**

Class visits, retreats and other learning experiences to places of cultural, educational and religious significance give enrichment to the lessons of the classroom. To ensure the desired outcomes of such trips, teachers, catechists and adult supervisors should prepare the children for the place that is to be visited and the things that are to be seen. A discussion should be held regarding the purpose(s) and goal(s) of the trip. An advance trip by the teacher is suggested.

Elementary schools should not conduct field trips out of state. Such trips should be discouraged and not promoted by the faculty or administration.

The written consent of parents must be obtained for every child participating in a field trip. Permission slips must inform parents of the following:
1. Name, location, and date(s) of the event
2. Cost to the child
3. Mode of transportation to be used
4. Name of supervisor overseeing the activity
5. Parent’s responsibility
6. Any known risks or exposures that might be harmful to the student or others

No child may participate unless a signed parent permission slip for the specific event is on file with the principal.

Medical information, contact persons and authorization for emergency medical treatment must be with the chaperones.

Whenever possible, bus transportation should be provided. The use of private vehicles is discouraged. If a private passenger vehicle must be used, the following must be verified by the driver.

- The driver must be 21 years of age or older.
- The driver must have a valid, non-probationary driver’s license and no physical disability that may impair the ability to drive safely.
- The vehicle must have a valid registration.
- The vehicle must have valid state inspection sticker (if this is applicable to your area).
- The vehicle must be insured for minimum limits of $300,000, or $500,000 Combined Single Limit (CSL).

A signed Volunteer Driver Information Sheet must be submitted to the principal for each vehicle used.

Each driver and/or chaperone should be given a copy of the approved itinerary including the route(s) to be followed and a summary of their responsibilities. For trips, other than interschool athletics, supervision of one (1) adult per ten (10) children is required.
2090 Grievance Procedure
When controversies arise in the school, solutions should be determined as close to the persons involved, as possible. Each school is to determine how that is to take place.

The procedure for resolving discrimination, harassment, access and other such complaints shall be written and readily available to parents and others using the school facilities and programs. Nothing in any Grievance Procedure alters an employee’s at-will status. Based on the severity of the matter, Diocese officials have discretion to bypass any step in the grievance procedure.

2091 Disruptive Behavior Policy
It is the Office of Catholic School's desire to create and maintain an educational environment which is free from disruptive, threatening, and violent behavior.

Inappropriate or intimidating behavior by individuals (staff members, school parents, or visitors) within the school setting will not be tolerated (see examples below). The safety of students and staff is paramount at all times.

Procedure
To ensure an orderly and peaceful environment conducive to learning, Catholic school administrators may need to limit an individual’s time at school, if the individual’s behavior becomes inappropriate or disruptive. Administrators should always be mindful, however, of the importance of parental involvement at Catholic schools and thus should exclude parents from school grounds or events only when clearly necessary.

Examples of inappropriate or disruptive behaviors may include, but are not limited to:

- Behavior that distracts, interferes with, or prevents normal school functions or activities. This behavior includes but is not limited to yelling, using profanity or vulgarity, verbally abusing others, making inappropriate demands for time and attention; making unreasonable demands for action (demanding an immediate appointment or a response to a complaint on the spot) or refusing a reasonable request for identification.
- Parent/Guardian coming to school primarily to visit or spend time with the
child rather than to assist as a volunteer (school is for learning, not for parenting time).

- Behavior that includes physical actions short of actual contact/injury (e.g., moving closer aggressively), oral or written threats to a person or property, whether in person, over the telephone, via e-mail or through other means of communication.
- Individuals engaging in loud or aggressive confrontations with others, making repeated or disproportionate demands on the time of teachers or administrators, interfering with the learning of other students, refusing to abide by the requests of school administrators, or their designees.
- Behavior that a reasonable person would interpret as being violent, (e.g., throwing things, pounding on a desk or door, or destroying property).
- Individuals harassing or stalking teaches or staff.
- Individuals engaging in unlawful or criminal behavior or conduct inconsistent with Catholic teaching.
- Individuals making excessive phone calls, voicemails, emails, and other forms of communications that become burdensome to administration, faculty or staff.
- Behavior(s), which create incidents that, are stressful or traumatic that interfere with a staff's or student's ability to effectively function in the school.

**Reporting**

All reports or complaints under this policy will be promptly investigated and will remain confidential to the extent possible. During an investigation, the school Pastor and the Superintendent of Catholic Schools will be consulted on how to handle the complaint. Some behaviors may also be prohibited under criminal law, and where necessary to ensure student safety, the Catholic School Administrator will promptly report such behavior to the proper authorities and shall subsequently inform the Pastor and the Superintendent of such report.

**If the behavior is determined to be disruptive by the administrator, an individual's exposure to the school may be limited according to the following guidelines:**

- Administrators will review school-wide procedures to ensure an orderly and
productive environment for all as a possible means of limiting inappropriate disruptions.

- Administrators may limit an individual’s exposure to the most problematic areas according to need.
- If previous attempts to limit disruptive behavior are unsuccessful, an administrator may restrict access to drop-off, pick-up, and emergency communications only.
- Such limited access would require written notification to the individual whose access is being restricted, with a detailed description of the newly defined boundaries.
- A lack of cooperation on the part of individuals could result in the exclusion of their student(s) from the school.
- Inappropriate or disruptive behavior by a visitor to the school may result in immediate removal of the individual from the school premises.
- The administrator should use discretion in an attempt to select the least restrictive, yet effective, method so as to ensure the orderly and productive educational environment while attempting not to escalate the situation.

**Protective Orders:**

Members of the staff who have obtained a protective order should supply a copy of the order to the Catholic School Administrator. Other parties may also be informed when deemed necessary for the safety of the School personnel and students.

**2100 Inventories**

The principal shall maintain an accurate and complete inventory of equipment, furniture, instructional materials, and textbooks.

The principal shall put in place procedures and safeguards to assure that the school’s inventory is used for appropriate school purposes, and is not taken or used for personal purposes.

This inventory is to be reviewed and updated each year and kept in a safe place.
2101 Copyright
The principal is responsible for the observance of copyright laws in their building. Copyright laws concerning the use of licensed software, obtained through the school for professional use, must be observed.

Staff shall be advised of and provided with information on appropriate use of copyrighted and licensed materials.

2110 Interrogation and/or Arrest of Students by Law Enforcement
All schools of the Diocese will cooperate with law enforcement agencies whenever and wherever possible.

If requests are received from police officers or other governmental investigative agents to have students released into custody and/or interrogated, permission must be secured, unless prohibited by law, from the custodial parent/guardian. In most cases, only the Child Protection Agency has the right to access students without prior parental permission and without school personnel being present.

If the custodial parent/guardian consent to an interrogation, any such interrogation within the school building should be in the presence of the school principal or other assigned staff member.

Information about a student shall not be released without the written permission of the custodial parent/guardian, except in emergency situations where the safety of the student or others is in immediate danger.

Private investigators, lawyers, or representatives of insurance agencies are not governmental agents and shall not be allowed, under any circumstances, to interrogate or obtain information about students. Staff should likewise not discuss any student information with such individuals without prior written consent from the parent/guardian.

2120 Parent Handbook
At the beginning of each school year, all parents shall be provided with and sign for a Parent/Student Handbook, which will be amended as needed.
2130 Custodial and Non-Custodial Parents

Unless a court order provided to school administration specifies otherwise, divorced or legally separated parents have equal access to their child’s school records. Educational decisions are to be determined by both parents.

Schools of the Diocese will follow what is specified in the divorce decree, to the extent possible. However, it is not the School’s responsibility to enforce the divorce decree provisions, which will remain the responsibility of the aggrieved parent.

2140 Registration Procedure

Each school will develop a detailed written procedure for registration. Appropriate forms are to be developed to secure the necessary student and family data. Tuition arrangements need to be clearly defined.

2141 Tuition

Each school will develop a tuition policy. This policy will require the signing of a tuition contract/agreement by a financially responsible parent/guardian or guarantor. Student tuition payments must be current. If tuition payments are not current, students are subject to removal from school or not eligible to be reenrolled. Records will not be released to the other school until tuition is paid.

2142 Cumulative Records

Each school will maintain a cumulative record for each student enrolled. Records will not be released to other schools unless tuition is current and written permission is received from the parent.

Exceptions can only be made by the Diocese's Superintendent of Schools.

Before cumulative records are released to another school or discarded after graduation, schools will retain permanently each student’s full name, date of birth, last known address, last known attendance date and grade, and graduation date (if applicable). Since the inception of an electronic student information system (SIS) at the diocesan level, these student records are automatically retained and archived. Schools must retain this information from all years prior to their participation in the diocesan-wide student information system permanently.
In the event of a school closure, the school must turn a copy of these records over to the diocese to be archived.

All concussion related information and forms will be kept until the youth athlete is 18 years of age.

2142.1 Sharing of Student Information
Student educational information is confidential and shall not be shared with outside organizations without the written consent of the parent(s) or legal guardian(s). School faculty and staff may access student information for educational purposes. Catholic schools within the Diocese of Grand Rapids may from time to time share student information for educational purposes within the schools of the diocese. For the purposes of this policy, Catholic schools within the diocese will be considered one organization.

2143 Major School Changes
Schools considering major changes (i.e. adding a grade, building new classrooms, etc.) must consult in writing with the superintendent of Catholic schools at the outset of the planning process. The superintendent will provide appropriate direction as needed.

SAFETY AND SECURITY

2149 Protection of Children and Young People
The Diocese of Grand Rapids is committed to the protection of children and young people. Diocesan ministries, parishes, schools, institutions, and agencies will evaluate the background of all employees and volunteers who have regular contact with minors. Background checks will be conducted utilizing the appropriate law enforcement and other community agencies. All applicants for employment or volunteer activities within the schools will be notified of these background checks.
and their employment or volunteer activity will be conditional upon the background checks.

Diocesan ministries, parishes, schools, institutions, and agencies will cooperate with parents, civil authorities, education and community organizations to provide appropriate education and training for children, youth, parents, ministers, educators and others about ways to make and maintain a safe environment for children. Schools within the Diocese require all employees and volunteers who have regular contact with minors, to complete the Virtus – Protecting God’s Children Training as a condition of employment or volunteer activity within the schools.

Also, as a condition of employment or volunteer activity within the schools, all employees and volunteers who have regular contact with minors must agree to comply with the “Standards of Ministerial Behavior in Dealing with Children and Young People”.

2150 Security

It is the responsibility of the principal to provide for the security of the school facilities.

All schools must provide a security system and be locked to the outside during school hours, unless the entrance is being monitored by staff.

In no event shall doors be locked in such a manner that it impedes or restricts exiting the building in the event of an emergency.

2151 Weapons

The possession, use or distribution of weapons by staff, students, parents or visitors is strictly prohibited in school, on school premises or at any school-sponsored activity.

A "weapon" is any object, device or instrument designed as a weapon, capable of producing bodily injury or used for the purpose of threatening or intimidating another person, including, but not limited to, loaded and/or unloaded firearms, air guns, pellet guns or bb guns; all knives; blades; clubs or bats; explosive devices and fireworks; metal knuckles; numchucks; throwing stars; stun guns; chains; arrows;
poison; ammunition; and any other object modified or intended to serve as a weapon.

No staff, student, parent or visitor shall possess, use or distribute any weapon or any object, device or instrument having the appearance of a weapon including, but not limited to, weapons which may be broken or non-functional, look-alike weapons, toy guns or knives, or any object that is a facsimile of a real weapon.

No student, parent or visitor shall use articles designed for other purposes (e.g., scissors, writing implements, sports equipment, etc.), to inflict bodily harm and/or intimidate or threaten another person.

Any staff or student found in violation of this policy will be subject to appropriate disciplinary action including, but not limited to, termination or permanent expulsion.

Any parent or visitor in violation of this policy will also be in violation of Diocesan Catholic Schools Policy 2091 and subject to the penalties provided in Policy 2091, including, but not limited to, appropriate legal action to bar the parent or visitor from the school premises and/or school-sponsored activities.

This policy is not intended to interfere with the possession and use of objects, devices or instruments defined as weapons for legitimate instructional and/or educational purposes (e.g., antique firearm or saber used for instructional purposes, or a knife used for cutting a birthday cake at a classroom party), with advance written permission from the building principal specifying the type of weapon and verifying its legitimate instructional and/or educational purpose.

**SAFETY AND SECURITY**

**2152 Student Safety**

The principal shall develop appropriate procedures to ensure adequate supervision of the students in the buildings and on the playground.

Staff shall be familiarized with the student safety/supervision policy annually at the beginning of the school year.
2153 Traffic Safety
The principal shall develop appropriate traffic procedures for the school.

The principal shall make sure that the school property is properly marked in accordance with the procedures developed. S/he shall also take measures to inform all those who drive or are transported to or from school of the procedures in place to assure the safety and smooth flow of traffic for all involved.

2154 Neglect or Abuse of Minors
Suspected neglect or abuse of minors must be reported to the proper authorities.

All state guidelines will be followed. This includes an immediate verbal report to the state's Child Protection Agency upon having reason to suspect abuse and follow-up written reporting within 72 hours thereafter.

"Child abuse" means harm or threatened harm to a child's health or welfare that occurs through non-accidental physical or mental injury, sexual abuse, sexual exploitation, or maltreatment, by a parent, a legal guardian, or any other person responsible for the child's health or welfare or by a teacher, a teacher's aide, or a member of the clergy.

"Child neglect" means harm or threatened harm to a child's health or welfare by a parent, legal guardian, or any other person responsible for the child's health or welfare that occurs through either of the following:

(i) Negligent treatment, including the failure to provide adequate food, clothing, shelter, or medical care.
(ii) Placing a child at an unreasonable risk to the child's health or welfare by failure of the parent, legal guardian, or other person responsible for the child's health or welfare to intervene to eliminate that risk when that person is able to do so and has, or should have, knowledge of the risk.

2155 Safe Environment/Registered Sex Offender
Michigan law (MCL 28.734, 771.2a) prohibits registered sex offenders from residing, working, or loitering within 1,000 feet of school property.
To provide a safe environment for the students of our schools, further restrictions are placed on registered sex offenders. Restrictions may also be implemented by the school for any person seeking to access school grounds or facilities when deemed necessary by school administration or the sponsoring parish to provide for a safe environment for students.

Persons who are registered sex offenders (in any state or jurisdiction) are subject to the following restrictions and conditions:

1) Access to school property, facilities or activities is prohibited without prior written permission from the school’s principal and pastor. Unless otherwise stated in the permission, separate permission will be required each time the person desires to access the property for an event.

2) Except under compelling circumstances, access during normal school days or other times when students are present will be denied. If a parent/guardian is the only available transportation for the student(s), then written permission may be allowed upon such conditions as are deemed appropriate by the principal and pastor to assure student safety (e.g. restricted times, restricted areas, remain in car, not initiate contact or engage in contact with other students).

3) Access may be allowed when deemed appropriate to non-student events (e.g. parent/teacher conferences). Permission must be received in writing by the school’s principal.

4) Volunteering for any school activity (e.g. room parent, field trip chaperone, coach) is prohibited.

5) While on the school property or at school activities, the individual shall be escorted by either a designated responsible adult selected by the school or a responsible adult approved by the school. This person shall have the knowledge of the individual’s offender status and have the individual within sight during the entire time the individual is on the school property. The escort shall be responsible for immediately reporting any suspicious behavior to the principal, pastor or person in charge of the activity or event.

6) Teachers and others determined by the principal or pastor to have a need to
know will be advised of the restrictions placed on access and participation by the subject individual(s). School staff will attempt to assure that restrictions placed on a parent/guardian do not have a negative impact on the student(s) in the school environment. The principal or pastor may, if they deem it appropriate, advise other parents of the individual’s conviction status, where it appears that contact with other students is occurring outside the school environment (e.g. visiting the home, arranging after-school activities, etc.)

7) Individuals subject to restrictions must carry the written authorization when present on school property or at school activities, and present it upon request of any school or parish administrator or security personnel.

All parents/guardians registering students with the school will be asked to identify if they have ever been convicted of any sex crime, are listed on any sex offender registry, or have been convicted of a “listed offense” as that is defined under Michigan law. Any person with knowledge of such status with regard to a parent/guardian, volunteer, employee or other person accessing school property or activities should advise the principal or pastor immediately. Staff members must report any known or suspected status as a sex offender or as a “listed offense” violator immediately to the principal.

Schools of the Diocese will conduct regular background checks of school volunteers and staff and may conduct background checks for parents or others accessing the school facilities as it determines appropriate. When a school becomes aware that a person is a registered sex offender, that person will be notified immediately of the provisions of the law and this policy.

The school principal and the pastor have full discretion to grant or deny access as they determine appropriate to assure the safety of the students. Exceptions may be made to the restrictions listed above, but only when compelling reasons are presented. Such reasons and the restrictions/conditions on any access allowed shall be recorded in the file of the student. The Diocese will be consulted for their advice on specific situations.

2156 Visitor Controls

During regular school operating hours, all visitors are required to:

- Produce at least one photo identification before being allowed entry into
the school (when identity is unknown to the principal or other authorized school staff);
- Legibly sign in (providing their name, company, address, phone number, and the point of contact within the school);
- Wear a visitor badge in plain view;
- Be escorted (when identity is unknown to the principal or other authorized school staff) at all times while in the facility (in areas that are accessible to students).

2172 Public Access

All buildings and programs shall provide for access for those with disabilities. The building principal shall be responsible for assuring that proper signage is in place to direct the public to accessible entrances, routes and facilities (bathrooms, etc.) within the school building and other facilities.

The building principal shall also be responsible for adequately notifying those who use the facilities or attend school events or programs on how to request accommodation for specific disabilities, such as visual or hearing impairments or wheel chair seating providing adequate lines of sight. The building principal shall be responsible for coordinating or delegating the accommodation request.

Accommodations do not need to be made which would alter the basic nature of the program or service, or which would be an undue burden on the school.

Concerns or complaints about lack of access or accommodation should be filed through the schools’ grievance policy, and may be appealed to the Diocese if not resolved at the school level.

2173 Student Dignity

Schools of the Diocese of Grand Rapids expect all students to conduct themselves with dignity and respect for fellow students, faculty and others. Discriminating against or harassing anyone, including discrimination or harassment based on sex, race, ethnicity, color, ancestry, height, weight, national origin, disability, religion or other protected status under applicable federal, state or local law, will not be tolerated.

Sexual harassment is a violation of Title VII of the Civil Rights of 1964 and the Michigan Elliot-Larsen Civil Rights Act. Sexual harassment is a form of sexual
discrimination. It is against the policy of the Diocese for any student, teacher, staff, parent, or volunteer, male or female, to sexually harass another person.

Additionally, the Catholic schools of the Diocese of Grand Rapids acknowledge the requirements of Title IX of the Education Act of 1972 (Public Law 92-318 as amended by Public Law 93-568). While the Catholic Schools of the Diocese of Grand Rapids do not concede that Title IX applies to them as private schools, they still use Title IX as a model for their practices. Accordingly, no school shall discriminate on the basis of sex in employment practices or within the educational programs or activities which they operate. Following the teaching of the Catholic Church does not constitute discrimination. Nonetheless, nothing herein will be interpreted as limiting the Catholic schools of the Diocese of Grand Rapids from exercising applicable religious exemptions found in state and federal statutes, regulations, and common law, or asserting the non-applicability of Title IX.

Thus, the school will delegate a person, usually the administrator, to answer questions and disseminate information about the policy, investigate complaints, and take appropriate corrective action akin to a Title IX coordinator. Any faculty, staff member, student, or other person in a working relationship with the school who feels that he or she has been a victim of harassment, should bring the matter to the immediate attention of the delegated person. For purposes of Title IX compliance and clarity for our constituencies, the principal or primary school leader within each school serves as the Title IX Coordinator.

Sexual Harassment includes, but is not limited to:
1. Making submission to unwelcomed sexual advances, submission to request for sexual favors, or submission to other verbal or physical conduct of a sexual nature, a condition of any person's association with or entitlement to any benefits from a diocesan school.
2. Making submission to, or rejection of, such conduct, the basis for decisions affecting any person with the school.
3. Creating an intimidating, hostile or offensive classroom or school environment, through such extreme or pervasive prohibited conduct.

Racial Harassment includes, but is not limited to:
1. Making negative references to a person's cultural or racial background.
2. Creating a hostile or offensive classroom or school environment through such conduct.
Bullying and other Harassment includes:

1. Other harassment of any nature includes conduct which may reasonably be offensive to others in an educational setting. Such conduct would include hazing, initiation procedures that involve physical or psychological abuse, and bullying.

2. Normally, bullying involves one or more students intentionally subjecting another student to repeated degrading actions, words, jokes or social interactions (which may include electronic and/or social media communications, occurring outside of school if they impact the school environment).

3. Bullying involves actions that are deliberate and sustained, and are intended to isolate, hurt, or humiliate and can be in the form of physical, oral, written or electronic interactions.

The Diocese of Grand Rapids will not tolerate discrimination, harassment or bullying while at school, during any school related programs and activities, or in any communications that may be exchanged between students. Harassment or bullying that occurs outside of school may be disciplined when it is determined to have an adverse impact on the school environment.

**IMPORTANT:** Although some of the definitions refer to repeated or sustained conduct, every incident of harassing or bullying behavior is prohibited. One hit, one name-calling, one derogatory email or similar type of behavior can result in discipline. Complaints of discrimination, harassment or bullying may be made through the Grievance Policy of the school. Any school personnel or other persons who are aware of a situation of discrimination, harassment or bullying should immediately notify the principal. The principal will determine the facts and take appropriate action that may include oral caution, written warning, probation, suspension, expulsion, or referral to civil authorities. If the principal is the one engaging in the alleged harassment or bullying, a report should be made to the pastor/canonical administrator or in the case of an independent Catholic school to the board chair.

Retaliation against any person for honestly reporting suspected discrimination, harassment or bullying of any type or participating in an investigation of suspected discrimination, harassment, or bullying is prohibited. Making false accusations against another person is also prohibited.
All investigations of complaints of discrimination, harassment or bullying will be done as promptly as the circumstances will allow. Confidentiality will be maintained to the extent possible, but absolute confidentiality cannot be guaranteed. The principal or other staff designee will investigate all incidents of suspected discrimination, harassment or bullying, whether or not filed under the Grievance Policy. A written report summarizing the concern, the investigation, the determination and any corrective action will be maintained. The parents of the involved students will be notified by the principal or other staff designee of the complaint and the results of the investigation.

The Diocese will not retaliate against a student who in good faith brings a complaint to the attention of the Diocese or participates in an investigation.

This policy shall be discussed by staff with the students at the beginning of each school year and shall be prominently posted in the parent student handbook and on the school’s website for parents' reference.

2174 Vandalism
All incidents of illegal entry, theft of property, vandalism, or damage to school property, must be reported to the principal as soon as it is discovered.

It is the responsibility of the principal to notify the pastor and take appropriate action to limit the chance of future loss, and to procure restitution from those involved.

2175 Wellness
In conformity with the Child Nutrition and Women, Infant and Children (WIC) Reauthorization Act of 2004, each school will develop a policy that includes goals for nutrition education, physical activity, and other school-based activities that are designed to promote student wellness. Included in this policy will be a means to measure implementation.

2176 Blood Borne Pathogens
In compliance with federal regulations, each school will develop and have on file a control plan for exposure to bodily fluids.
All school employees will be trained each year in the use of universal health care precautions to prevent and control such exposure. This training will be recorded and kept on file by the school. Records will be kept that document compliance with state and federal regulations and demonstrate that the control plan is being followed.

All school employees who are considered Category A employees, as defined by the Occupational Safety and Health Administration (OSHA), must be offered the Hepatitis B vaccine.

The school will also maintain adequate supplies of latex gloves, puncture-resistant containers, and antiseptics, available to and for all employees.

2177 Lice
Each school will develop a plan for identifying and containing head lice. This plan will include criteria for student exclusion due to head lice and nit infestation which should be developed in accordance with MDE and MDCH recommendations.

Communications should be developed to inform parents of the schools’ procedures and when exposure to head lice may have occurred in the school.

2178 Pesticide Use
Parents must be notified of their right to be advised when pesticide and other chemical treatments will be used on school property.

If requested, the school will send a notice to parents when pesticides and chemical treatments are used. The school must keep a record of these notifications.

Every attempt shall be made to do treatments at times when students are not scheduled to be using the building and preferably during school breaks or on weekends when there will be time for any chemicals to dissipate before the return of the students.

2179 Administration of Medication
Each school must develop procedures for the distribution of medication. All schools must follow state guidelines regarding the storing and dispensing of medication.
2180 Student Substance Abuse

The use of or possession of alcohol, tobacco, e-cigarettes, marijuana, vapes or any illegal or controlled substance, as well as, the abuse of any legal substance is prohibited. The above substances cannot be possessed, bought, sold or consumed on the property of the schools, or at any student-oriented event. Parents will be notified immediately if use of these substances is suspected.

Penalties may be incurred which could include students being suspended or expelled from school. In certain circumstances, appropriate law enforcement agencies may be contacted.

Each school is required to formulate appropriate procedures to address violations of this policy.

The school should be encouraged to make appropriate use of substance abuse information and similar materials from federal, state and local health departments and other agencies.

2181 Adult Substance Abuse

Catholic schools in the Diocese maintain a strictly drug-free workplace. The abuse of drugs and alcohol poses a serious threat to both their students and employees. Commonly abused or improperly used drugs and substances include, but are not limited to: alcohol, pain killers, sedatives, stimulants and tranquilizers, as well as marijuana, cocaine, heroin, or any controlled substance. It is the responsibility of both the employee and the school to maintain a safe, healthful and efficient school and work environment. Violations of this policy will result in corrective action, up to and including termination. For this purpose, the Diocese has adopted these policies:

• The possession, transfer, use or sale of unauthorized or illegal drugs (including marijuana) or the misuse of any legal drugs on school premises or at school activities or while on school business is prohibited and may result in discharge and possible criminal prosecution.
• Legally prescribed medications and legal over-the-counter medications are not excluded from this policy and are permitted to the extent that the use of such medications does not adversely affect work ability, job performance, or the safety of that individual or others. The use of medical marijuana is not permitted. Questions or concerns regarding prescribed medications should be directed to the
school leader or school/parish business manager as employees have an affirmative
obligation to do so.
• Employees or volunteers under the influence of drugs or alcohol, which impairs judgment, performance, or behavior, while on school premises, at school activities, or while on school business, are subject to immediate exclusion from the activity, and corrective action, including discharge.
• Employee off duty substance use or abuse, and the use or misuse of prescription or over-the-counter drugs is also prohibited to the extent that such use or misuse adversely affects the employee’s ability to perform his or her job.
• Employees are subject to drug and/or alcohol screens on a random basis and/or for reasonable suspicion.
• An employee's failure to cooperate in drug and/or alcohol screens upon request is subject to corrective action, including discharge.
• Employees who express a personal problem with alcohol or other drugs are encouraged to voluntarily seek treatment before these problems affect performance and lead to corrective action.

Adult use of alcohol or controlled substances (including marijuana) at student events or activities is prohibited. Adults are expected not to be under the influence of substances (drugs/alcohol) when attending school activities and events.

Disruptive or inappropriate behavior at school functions, whether or not related to substance abuse, may result in removal from school property, restriction or prohibition from coming on school property in the future and/or referral to law enforcement authorities.

2182 Electronic Information and Acceptable Use Policy
includes Social Media General Standards consistent with Social Media Policy 4520
(See Addendum A for CIPA Compliance Documentation)

Purpose
The Roman Catholic Diocese of Grand Rapids encourages and strongly promotes the use of electronic information technologies in our ministries. As a Catholic organization we have been charged to embrace technology as a way to connect with an online community bringing the message of Jesus Christ and reflecting his
character to the world. Every school must have a policy in place such as the following example:

[name of school] (the “School”) encourages and strongly promotes the use of electronic information technologies in educational endeavors. The School provides access to electronic information resources in a variety of formats, and for the development of information management skills. Together these allow learners to access current and relevant resources, provide the opportunity to communicate in a technologically rich environment and assist them in becoming responsible, self-directed, lifelong learners.

The School has developed this Electronic Information Access and Acceptable Use of School Systems Policy (this “Policy”) to govern the access, use and security of School Systems (defined below). Every User (defined below) must read, sign and abide by this Policy.

For the purposes of this Policy, the following capitalized terms have the meanings ascribed to them below. Additional capitalized terms are defined within this Policy.

(a) “PEDs” means portable electronic devices, including, without limitation, laptop computers, cellular telephones, pocket personal computers, handheld computers, cameras, video recorders, sound recording devices and all forms of portable electronic devices.

(b) “School Confidential Information” means all confidential and/or proprietary information and materials of the School, its faculty, administrators, students, employees, volunteers and/or third parties with which the School does business.

(c) “School Electronic Information” means all electronic information (including the School Confidential Information), communications or activity created, sent, received, stored and/or otherwise used on behalf of the School, whether or not the School Systems are used to create, send, receive, store or otherwise use that information or those communications. The School Electronic Information includes voicemail messages on the School Equipment.

(d) “School Equipment” means any and all electronic devices owned, leased or operated by or for the benefit of the School, which have the capability of creating, sending, receiving, storing and/or otherwise using electronic information, materials and/or communications, including, but not limited to, pagers,
computers, servers, disk drives, scanners, photocopiers, printers, fax machines, telephones and PEDs. School Equipment includes all operating software, application software and firmware owned and/or licensed by the School, which resides and/or is embedded in any the School Equipment.

(e) “School Networks” means all School voice and data systems, including, without limitation, the School’s Internet, intranet and extranet systems.

(f) “School Systems” means the School Equipment and the School Networks.

(g) “Users” means any individual who accesses and/or uses School Systems, including, without limitation: (i) School full time, part-time and temporary faculty and/or employees; (ii) School third party contractors, vendors, consultants, representatives and agents, as well as their full time, part-time and temporary employees; and (iii) parents, students and volunteers.

(h) “User Equipment” means electronic devices that are continuously or intermittently connected to School Systems, or a component thereof, which are not owned or leased by the School, including, without limitation, User-owned computers, pagers, telephones, fax machines and PEDs. User Equipment without connectivity to School Systems does not fall under the purview of this Policy.

Scope

This Policy applies to all Users and to all School Systems, User Equipment, School Confidential Information and School Electronic Information.

To the extent this Policy applies to School faculty and/or employees, and volunteers, this Policy supplements, but does not replace, the School’s [policies/handbook/manual]. The terms of this Policy will govern any conflict or inconsistencies with the terms of such [policies/handbook/manual]. Any School faculty and/or employee who violate this Policy may be subject to disciplinary action, up to and including termination.

To the extent this Policy applies to students, this Policy supplements, but does not replace, the School’s [policies/rules/handbook]. The terms of this Policy will govern any conflict or inconsistencies with the terms of such [policies/rules/handbook]. Any student who violates this Policy may be subject to disciplinary action, up to and including suspension and/or expulsion.
To the extent this Policy applies to third parties, this Policy supplements, but does not replace, School’s agreements with such third parties. The terms of this Policy will govern any conflict or inconsistencies with the terms of such agreements. Third parties who violate this Policy may no longer be considered eligible for access to and/or use of School Systems, School Confidential Information and/or School Electronic Information. A third party’s violation of this Policy shall also be considered a material breach of its agreement with School, entitling School to terminate such agreement for cause.

Policy

The School Systems, School Confidential Information and School Electronic Information are the School’s property and may be used solely for educational purposes and/or the School’s operational activities. Each User must take all necessary steps to prevent unauthorized access to or use of School Confidential Information and School Electronic Information. Unless otherwise directed by School, or permitted or required by this Policy, Users may not: (a) take, retain or use School Confidential Information and/or School Electronic Information for User’s own benefit; (b) disclose School Confidential Information and/or School Electronic Information to any other entity or unauthorized person without the written permission from a School officer; (c) delete, encrypt, password protect, or retain electronic files containing School Confidential Information and/or School Electronic Information (including emails and attachments); or (d) take any other action that impairs, restricts, limits, or impedes School’s ability to have full access to and use of its School Confidential Information and/or School Electronic Information. Upon request, User shall return to School all School Confidential Information and/or School Electronic Information, and otherwise fully cooperate with and assist School in ensuring School’s ability to have full access to and use of School Confidential Information and/or School Electronic Information. Such cooperation and assistance may include, but is not limited to, removing any password protection, encryption or other proprietary format on School Confidential Information and/or School Electronic Information.

The School retains the right to search, monitor, access and/or review all School Systems, School Electronic Information and all other electronic and voice mail communications, computer files, databases and any other electronic transmissions contained in or accessed by School Systems, at any time, with or without notice, at
School’s sole discretion. No user of any of the School Systems has a reasonable expectation of privacy to any of his/her activities on the School Systems. This may include, without limitation: (a) viewing, printing, downloading and/or listening to emails and voicemails created, sent, received, stored and/or otherwise used in or through School Systems; (b) viewing, modifying and/or removing a User’s electronic mailbox; and/or reviewing audit trails created by School Systems.

No email, voicemail or other information, whether received, sent, stored or used on or through School Systems, is private. Users have no reasonable expectation that any information contained on any School Systems is confidential or private to them. The School’s System is not a public forum and access to the technology is a privilege and not a right. By using School Systems, Users consent to the access and disclosure of email messages, voicemail messages and other information within School’s organization without restrictions, but subject to School’s legal and contractual obligations of confidentiality. Users should not use School Systems to create, send, receive and/or store information that is personal if it is confidential or sensitive, since such personal information will be considered School Electronic Information if created, sent, received and/or stored using School Systems.

The School makes no warranties of any kind, whether expressed or implied, for any reason regarding the access to, or use, quality or availability of, School Systems, including but not limited to the loss of data. All School Systems are provided on an “as is, as available” basis.

**School Responsibility**

**Internet Safety Provisions**

The School will designate a system administrator who will manage the School Systems and make the final determination as to what is inappropriate use based on this Policy. The system administrator will designate a back-up system administrator in the event that the system administrator is not available. The system administrator or the back-up system administrator may close an account at any time for infractions or temporarily remove a User account and/or a User’s access to or use of the School Systems for any reason, including, without limitation, to prevent unauthorized activity.

The School will implement filtering software intended to block access to materials that are obscene, child pornography, harmful to minors, or that the School
determines to be inappropriate for minors. However, the School does not guarantee that it will be able to fully prevent any User’s access to such materials, or that Users will not have access to such materials while using School Systems. The filtering software will operate on all School Equipment which have Internet access while at school or outside of the School’s Networks and on all User Equipment within the School wide area network (WAN) or local area network (LAN).

Subject to system administrator approval and staff supervision, technology protection measures may be disabled for adults or, in the case of minors, minimized only for bona fide research or other lawful purposes.

The School does not take responsibility for resources located or actions taken by any Users that do not support the purposes of the School.

It shall be the responsibility of all members of the School staff to supervise and monitor usage of the School Network and access to the Internet in accordance with this Policy and the Children’s Internet Protection Act.

The school will implement education about online safety and appropriate online behavior. This education includes, but is not limited to, interacting with other individuals on social networking websites and chat rooms and cyberbullying awareness and response.

**[name of school] Network Users**

Users will be granted access to appropriate services offered by the School Network. In addition, the following people may become account holders or members of the School Network:

1. **Students.** Students who are currently enrolled in the School may be granted a School Network account upon agreement to the terms stated in this Policy.

2. **Faculty and Staff.** Staff members currently employed by the School may be granted a School Network account upon agreement to the terms stated in this Policy.

3. **Others.** Anyone may request a special account on or use of the School Network. These requests will be granted on a case-by-case basis, depending on need and resource availability.
Privileges and Responsibilities of Users

Privileges

Subject to the terms of this Policy, Users have the privilege to:

1. use all authorized School Systems for which they have received training to facilitate learning and enhance educational information exchange and/or assist with performance of job responsibilities.

2. access information from outside resources which facilitate learning and enhance educational information exchange and/or assist with performance of job responsibilities.

3. access School Networks and the Internet to retrieve information to facilitate learning and enhance educational information exchange and/or assist with performance of job responsibilities.

Responsibilities

Users are responsible for:

1. using School Systems only for facilitating learning, appropriate personal growth and enhancing educational information exchange consistent with the purposes of the School.

2. attending appropriate training sessions in the use and care of School Systems.

3. seeking instruction for the use of any available technology with which they are not familiar.

4. adhering to the rules established for the use of School Systems, in the School or through remote access outside of the School.

5. refraining from disclosing, using or disseminating personal identification information regarding students over the Internet without parent or guardian authorization.

6. maintaining the privacy of passwords and are prohibited from publishing or discussing passwords. School Network accounts are to be used only by the authorized owner of the account for the authorized purposes. students may use e-mail, chat, instant messaging, and other forms of two-way
electronic communications only for educational purposes and only under the direct supervision of an adult.

7. having all electronic media scanned for virus, dirt, damage or other contamination which might endanger the integrity of School Systems before they are used in School Systems.

8. material received, created or distributed using School Systems.

9. maintaining the integrity of the electronic messaging system (voice, e-mail, etc.), deleting files or messages if they have exceeded their established limit, reporting any violations of privacy and making only those contacts which facilitate learning and enhance educational information exchange. If a User remains in noncompliance, the system administrator may delete files and messages, freeze the account, and/or close the account.

10. preventing material considered pornographic by the School, inappropriate files or files dangerous to the integrity of the School’s Systems from entering the School via the Internet or from being reproduced in visual, digital or written format.

11. awareness of and adherence to copyright laws and guidelines and trademark laws and applicable licensing agreements in the use of School Systems and in the transmission or copying of text or files on the Internet or from other resources. Users must also comply with all other applicable laws, both state and federal, with respect to their use of the School’s Systems.

12. using caution (Buyer Beware) when considering the purchase of goods or services over the Internet. The School is not liable for any financial obligations made nor any personal information provided while using School Systems.

13. financial restitution for unauthorized costs incurred or damages or repair necessitated by inappropriate use or access.

14. any damages to, or incurred on, User Equipment. Users accessing School Systems on User Equipment do so at their own risk.

15. abiding by the rules set forth in this Policy, general School rules, and additional rules as may be established by the School. Local School Committee policies, staff manuals, departmental procedures, and student handbooks may include such rules.

Users are prohibited from:
16. using the technology for a “for-profit” business, for product advertisement or political lobbying.

17. the malicious use of technology to disrupt the use of technology by others, to harass or discriminate against others or to infiltrate computer systems or files without proper permission and authorization (hacking).

18. accessing, using, disclosing or disseminating personal identification information about minors.

19. using School Systems to draft, send, or receive inappropriate communications and material including but not limited to, items which might be considered as pornographic, obscene, profane, vulgar, harassing, threatening, defamatory, bullying or are prohibited by law.

20. participating in hate mail, harassment, discriminatory remarks and other antisocial/bullying behaviors on the network.

21. vandalizing School Systems or any other information technologies (the School's or any others). Vandalism is defined as any attempt to harm, destroy, or disrupt or hack the operation of the School’s Systems. Vandalism includes, but is not limited to, the creation or intentional receipt or transmission of computer viruses.

Social Media Use
All communication with minors (in person, via social media, websites, text messages, etc.) must adhere to:

- The Charter for Protection of Children and Young People
- The Children’s Online Privacy and Protection Act
- The Diocesan Office of Child and Youth Protection policies

With the continuing evolution of new media and next generation communications tools, the way in which our parishes, schools and families can communicate internally and externally continues to develop at a rapid pace. While this creates new opportunities, it also creates new responsibilities.

Electronic communication with minors must not be undertaken lightly. School, Parish and other Affiliate Employees and Volunteers must consistently adhere to Catholic values and transparency with respect to such communications.
Many Web 2.0 tools commonly used for instruction have social media components to them which allow for sharing, collaboration and commenting. Some of these sites can be set up for a particular classroom or group, thus limiting comments to recognized participants. Others are more public in nature, allowing interaction from a wider audience. The following guidelines have been established to provide a framework for successful and beneficial use of opportunities afforded by such tools.

Schools receiving federal funding for computer technology through E-Rate must comply with the Children's Internet Protection Act (CIPA), 47 U.S.C. § 254(h)(5), which requires monitoring internet use by minors; filters to restrict access to obscenity, child pornography, or other material harmful to minors; and educating minors about appropriate online behavior, social networking safety, and cyberbullying.

In light of our diocesan Catholic schools’ mission to create a Catholic culture for instruction and faith formation and out of respect for the primary role that parents have as the first educators of their children, the following guidelines have been established to provide a framework for successful and beneficial use of opportunities afforded by such tools.

**General Standards for Staff and Volunteers:**
It is the responsibility of the organization and staff members to know and adhere to the standards reflected in the Social Media Policy established by the Diocese of Grand Rapids.

When communicating with minors:

a. Use of communication tools between adults and minors should be confined to content that is ministerial / educational in nature and directly relates to the work around the subject matter at hand.

b. Use of communication tools between adults and minors such as instant messaging, chat, email, or text messaging for topics that are personal or that do not relate to ministerial / educational work are prohibited.
c. Do not accept friend or follow requests from minors on your personal accounts.

d. While it is understood that faculty/staff may use communication tools outside of conventional work hours to fulfill professional obligations such as responding to email, facilitating forum discussion or blog commentary. Each staff member will define the norms for electronic communication in his or her setting.

e. It is the responsibility of the staff member to set the proper security guidelines and monitor social media tools as used for educational/ministerial purposes, report any concerns regarding communication with minors, as well as instruct minors in appropriate use.

General Standards for Minors:
It is the responsibility of the user to utilize tools in a responsible manner that adheres to Acceptable Use Policy and the Code of Conduct established by [name of organization].

1. You are a representative of your family, your Church and your school. Bring pride to each of these important aspects of your life.
2. Following, linking, or “friending” official professional social media accounts of the parish/school is acceptable and encouraged.
3. Following, linking, or “friending” personal accounts of adults is not acceptable.
4. Respect all people, whether you know them or not. Keep all chat positive.
5. Be careful about "kidding" and "joking". Not everyone will see it as kidding and/or joking.
6. Ask permission before posting photos and video of others; remove photos and videos of others if requested.
7. While it is understood that users may use communication tools outside of conventional hours to participate in programs; i.e. email, research, etc., users should exercise a balanced approach to online interaction.

General Standards for Parents/Guardians
It is the responsibility of parents/guardians to be aware of social media use by their children and to communicate with the parish, school or affiliate organization
if they have concerns. For additional resources, visit our Web portal at: [insert URL here]

1. Establish clear guidelines for use in the home, i.e. hours of disconnect or charging a device in a common area (not stored in the bedroom overnight);
2. Participate with your children in their online activities;
   2.1. know and follow your children on Instagram, Twitter and other social accounts
   2.2. read and comment on program blogs
   2.3. play a game across the room
3. Following, linking, or “friending” official professional social media accounts of the parish / school is acceptable and encouraged.
4. Model and support responsible use as outlined here and in the Acceptable Use Policy.
Declaration

All users are required to sign this form. All minors are considered users and will require the signature of a parent or guardian in the space provided at the bottom of the page. Due to the nature and complexity of the policy, minors in grades K-6 will not be required to sign the form; however, minors in grades 7-12 must read and sign the form in addition to their parent(s) or guardian(s).

The School has developed the Electronic Information and Acceptable Use Policy for all users and it applies to all School Systems, User Equipment, School Confidential Information and School Electronic Information. Access and use of School Systems is a privilege for each User.

I have read, understand and will abide by the Electronic Information and Acceptable Use Policy. I agree to be responsible for and abide by this Policy and all other rules, regulations, policies and/or procedures related to School Systems. I understand that should I commit any violation, my privileges and/or account may be revoked, and that disciplinary action and/or appropriate legal action may be taken.

I understand and acknowledge that I might locate material that could be considered offensive or controversial, that parents of minors should be aware of the existence of such materials and monitor home usage of School Systems, and that students knowingly bringing or downloading such material into the School environment will be dealt with according to the discipline policies of the School.

In consideration for the privilege of using the School Systems and in consideration for having access to the information contained or accessed on it, I hereby release the School and its operators and sponsors, its faculty and staff and all organizations, groups and institutions with which the School is affiliated for any and all claims of any nature arising from my use, my child's use or inability to use, the School Systems.

User's Signature: ____________________________________________________________

Print User's Name: __________________________________________________________

Date: __________________________

Parent or Guardian (only needed for users under the age of 18)

As the parent or guardian of this minor, I have read the Electronic Information and Acceptable Use Policy and understand that this access is designed for legitimate educational purposes. The School has taken precautions to prohibit access to inappropriate materials. However, I also recognize it is impossible for the School to restrict access to all inappropriate or copyrighted materials and I will not hold them responsible for materials acquired on or through the School Systems or any consequences of such acquisition of materials. Further, I accept full responsibility for supervision if and when my child's use of any School Systems is not in a school setting.

Users are responsible for attending appropriate training sessions in the use and care of all School Systems and should refrain from using any technology for which they have not received training.

Users may be required to make full financial restitution for any damages to School Systems or unauthorized expenses incurred through the use of School Systems.

As the lawfully authorized parent or guardian of the minor identified above, I hereby give permission to issue a membership account to this individual.

Parent/Guardian Signature: __________________________________________________

Print Parent/Guardian Name: ________________________________________________
2183 Asbestos Management
Schools of the Diocese of Grand Rapids are required to have a current asbestos inspection and the school's asbestos management plan on file in the school. As a matter of best practice related to asbestos, school maintenance personnel are NOT to perform any repairs, including minor repairs, and/or tasks that might potentially disturb known or assumed asbestos containing material. The Diocese of Grand Rapids is requiring schools to engage a professional service provider to do this work and document the work as required by law.

2190 Professional in Charge:
The principal is responsible for adequate supervision of students, employees and building operations. In the absence of the principal, he/she will designate a professional educator to be in charge, subject to the approval of the pastor. The staff will be made aware of the person in charge in the principal’s absence. If the absence will be for an extended period of time, the parents and students shall also be notified of the person in charge.

PROMOTION AND MARKETING

2192 Marketing
All Catholic schools in the Diocese of Grand Rapids will develop a marketing plan designed to increase enrollment and further the mission of Catholic education. Catholic schools are encouraged to work together in this endeavor. Use of students or student pictures in any marketing efforts shall only occur with written consent of the student's parents. The marketing plan shall not include efforts to market the sports programs at the high school level to attract students based on their participation in sports which is prohibited by MHSAA rules.

2193 Admissions
Each Catholic school in the Diocese will develop an admissions policy that defines:
1. Whom they are to serve
2. What the needs are of those whom they serve
3. How the school plans to meet the needs of those whom they serve
4. Conditions for enrollment
The admissions policy shall prohibit the recruitment of students based on their participation in sports at the high school level, in accordance with MHSAA rules.

**Budget and Finance**

**BUDGET**

**3010 Annual Budget**
All schools are required to develop a budget which is approved by the School Board and the Pastor/Canonical Administrator (if a parish school - in consultation with the Parish Finance Council). The School Board shall collaborate with the Principal and Pastor in monitoring budget expenditures and revenue throughout the year (if a parish school - in consultation with the Parish Finance Council).

**3012 Balanced Budget**
All schools are required to work collaboratively with their Board Finance Committee, Business Manager, and if a parish school, the Parish Finance Council to prepare a balanced budget and submit it to the School Board and Pastor for final approval according to the budget time line established in Policy 3016.

**3013 Long-Range (5-year) Capital Budget**
Principals are required to work collaboratively with their Board Finance Committee, Business Manager, and if a parish school, the Parish Finance Council to prepare a long-range capital budget and submit it to the School Board and Pastor for review, according to the budget time line established in Policy 3016.

**3014 3-Year Operating Budget**
Principals are encouraged to work collaboratively with their Board Finance Committee, Business Manager, and if a parish school, the Parish Finance Council to prepare 3-year operating budget, for the purpose of anticipating future needs. This budget is to be reviewed by their School Board and Pastor, according to the budget time line established in Policy 3016.

**3016 Budget Time Line**
All schools are required to submit an annual school operating and capital budget (including technology) according to the following timeline:
September/October
- Board Finance Committee, School Business Manager, and Principal revise the current year annual school budget to reflect actual enrollment and contracted tuition following the final count day in September.
- Submit revised budget for Board approval and then Pastor/Canonical Administrator approval

November/December
- Board Finance Committee, School Business Manager, and Principal submit preliminary annual school budget to School Board

December/January
- School Board approves tuition rates within a preliminary annual budget
- Communicate board-approved tuition rates and preliminary annual school budget to Pastor/Canonical Administrator prior to consultation with Finance Council (if parish school)
- Submit board-approved tuition rates and preliminary annual budget to the Parish Finance Council for consultation (if parish school)

January
- Present board-approved school preliminary annual budget to the Finance Council for consultation (if parish school)

February
- Pastor/Canonical Administrator approves tuition rates and preliminary annual school budget. Tuition shall not be communicated until board approval and pastor/canonical administrator approval has been achieved.
- Prepare individualized family tuition contracts, using budgeted tuition rates
  - All tuition contracts should show full cost followed by all appropriate reductions (parish support, multiple child discounts, scholarships, all other grants and aid)
  - The balance remaining is the individualized family tuition, for which the family is contracted to pay.

March/April
- Board Finance Committee, School Business Manager, and Principal prepare an updated 3-year operating budget and 5-year capital budget
- Present updated 3-year operating budget and 5-year capital budget to School Board for approval and (if parish school) to Finance Council for consultation
• Update preliminary annual budget with projected diocesan rates (health insurance, utilities, etc.)

**May/June**

• Finalize annual school budget for staffing and class configurations using an updated projected enrollment

• Obtain school board approval and final pastor/canonical administrator approval
  
  o If parish school, be sure to consult with parish finance council

• Submit annual school budget to the Diocese Grand Rapids through the process developed by the office of finance

**3025 Capital Expenditures**

Capital expenditures that exceed $10,000 in any school year must first be approved by the Pastor/Canonical Administrator (if a parish school - in consultation with the Parish Finance Council) and then presented to the diocesan finance office for approval, before the expenditure can take place.

**3040 Credit Card/ Open Purchase Orders**

The use of credit cards or open purchase orders should be discouraged. The Business Manager / Principal will be responsible for the use of these for the school. The sole use of a credit card or open purchase order should be for goods or services necessary for the operation of the school. Appropriate documentation must accompany all transactions.

**3041 Expense Reimbursements**

Only budget expenses that were approved prior to the purchase will be reimbursed to the staff member making the request. All expenses requiring reimbursement must have appropriate documentation submitted at the time the reimbursement request is made. All expense reimbursements should be reasonable and generally should not include alcohol. Expense reimbursement for entertainment purposes should have prior approval.

**3042 Club and Organization Accountability**

No organization affiliated with the school will keep separate checking accounts or make their own payments on behalf of the school. All monies are to be kept by the parish or school business office which will provide the organization or club a regular accounting of those funds.
3043 Club and Organization Payments
All clubs and organizations that have expenses requiring payment will submit those payment requests to the school/parish business office for payment. Proper documentation must be included.

3060 Allocations of Non-Direct Costs (i.e. Shared Compensation, Plant Costs, etc.)
Allocations of non-direct costs should be consistently made in parish schools by a standard formula (i.e. square footage, hours worked, budgeted FTE’s, etc.)

3070 Average Class Size Minimum
The minimum average class size within schools should be maintained at no less than 18. When the average class size falls below this number, it begins to threaten the long-term sustainability of the school and parish ministry. For long-term sustainability and the financial health of the school, consideration should be given to creative ways to move class size as close to the maximum guidelines as stated in Policy 5202, Curriculum and Instruction.

3080 Property Damage
Parents of students will be held responsible for the replacement of property and materials damaged, or lost through the negligence of their children.

TUITION AND FEES

3130 Parishioner in Good Standing
It is recommended that parishes define what it means to be a parishioner in good standing.

3150 Tuition Waiver
If financially feasible, schools may wish to consider waiving a portion of the tuition for the child(ren) of full-time instructional staff, support staff and administrator(s) if their child(ren) attends the Catholic school in which the employee is working. Waiver percentage and eligibility are defined in the school’s Personnel Handbook.
3155 Tuition Collection/Sunday Giving

Written agreements, tuition payment guidelines/policies, definitions of parishioner in good standing, or any other tuition related documents must ensure that all Sunday offertory giving is voluntary. Sunday giving can be encouraged. There can never be a quid pro quo (trading of services in lieu of tuition).

3160 Tuition Management

All tuition payment plan options require the use of the diocesan approved third-party tuition collection service that provides the diocese electronic access to school level and diocesan level roll-up reports. All families must be entered into the tuition management service. A method is established to enter families that have selected the full-payment or semester payment options into the tuition management service without charge to those families.

All schools must develop a formal tuition payment policy which should at least include (a) full payment, (b) semester payments (two payments of 50% each), and (c) a monthly payment plan. The policy should also address late payments, school fees, and tuition owed from previous years.

3161 Non-Admission of Students Due to Tuition Delinquency

Families failing to pay tuition, according to the school tuition payment guidelines, will be informed that their student(s) will not be re/admitted to the school. If families are not current in their payment of tuition:

- At least 10 days prior to the beginning of school, their student(s) will not be re-admitted on the first day of school.
- At least 10 days prior to the beginning of second semester, their student(s) will not be re-admitted on the first day of the second semester.
- At least 10 days prior to the end of the school year, their student(s) will not be allowed to complete the school year and the transcript will remain incomplete.
- A student may be denied admission to the school at any time during the school year due to tuition delinquency.

Tuition delinquency accounts will be submitted to a professional collection agency to pursue collection. If the student is in their final year at the school, he/she:
- Will not receive his/her diploma until payment is made.
- Will not be eligible for a parish subsidy to any other Catholic school in the diocese until payment is made in full.
- Will not have his/her completed records/transcripts released until payment is made in full.

If a family pays the full past-due balance and pays the full second semester before the first day of the second semester, or makes other payment arrangements in writing, the student(s) may be re-admitted.

**3162 Delinquent Tuition from Previous Year(s)**
All previously unpaid tuition must be paid at least 10 days before school starts, if a student is to be readmitted on the first day of class for a new school year. Payments are to be made directly to the parish/school. If payment is not possible, suitable arrangements must be made with the Parish/School. If contact is not made with the Parish/School, a notice may be sent to the family that the account will be submitted to a professional collection agency to pursue collection.

**3165 Registration Fee**
Schools should collect a registration fee as a good faith commitment. This registration fee is not refundable per individual school deadlines.

**3166 Cost Per Student**
Schools should strive to monitor the cost per student closely, while striving to track with diocesan norms as documented in the annual Diocesan Catholic Schools Statistical Report.

**3167 Tuition Schedules/Norms**
Tuition for the first child should be at least 65-75% of the cost per student. Parishes may wish to establish discounts for multiple children.

**3168 Bishop’s Scholarship and other Diocesan Scholarship Requirements**
Parents of students applying for scholarships must demonstrate financial need by completing the third-party financial assistance application process. If families qualify for assistance, scholarships will be granted from available funds with:
- Verification from the Pastor that the families are members in good standing and are involved in the life of the parish
- Verification from the principal that the students maintain good conduct, attendance, and substantial academic progress.

Parishes/Schools must use the same third-party assessment provider as the diocese.

**3169 Consideration of Financial Ability**

For those parish families considered to be in good standing and that demonstrate financial need, it is recommended that parishes provide tuition assistance to these families as best they can.

**3170 Admissions Policy (Re: Outstanding Tuition)**

Families that have outstanding tuition in a Catholic school within the Diocese of Grand Rapids will not be considered for admission to another Diocesan Catholic School until the outstanding tuition has been paid.

**PARISH SUBSIDY/INVESTMENT**

**3330 Parish Support of Catholic Schools**

(See [Addendum C](#) for Decree)

**Parishes with schools operated or sponsored by a parish:**

a. The norm for parish support for parishes that operate schools is that not more than 35% of the offertory collection may be used to support a parish elementary school (K-8). In this way, funds are available for other necessary programs and parish activities as part of a vital parish. In addition, no more than 50% of the school budget may come from the offertory collection. Preschool and pre-kindergarten should be self-sustaining programs and parishes with or without schools are not expected to provide support for these programs.
b. Parishes that operate and sponsor an elementary school are not obliged to support another elementary school, but are expected to provide support at the secondary level (9-12).

c. Support for secondary school students is set at $1,000 per student effective the school year 2012-2013 with an increase of $50 per student per year for successive years.

d. Parishes are also encouraged to support individual school scholarship funds or the Diocesan Scholarship Fund as part of their parish outreach.

Parishes without schools:

a. Support for elementary students was set at $1,000 per student for the school year 2012-2013 and increases $50 per student per year for successive years. This support is granted to those parishioners who request it and have the support of their pastors. In return, with the acceptance of the subsidy by the receiving parish, the parishioner shall receive the "in parish tuition rate".

b. Support for secondary school students was set at $1,000 for the school year 2012-2013 with an increase of $50 per year for successive years.

c. Parishes may also wish to make, as part of their parish outreach, a contribution to the scholarship fund of the individual parishes or to the Diocesan Scholarship Fund that would be over and above any subsidy.

INTERNAL CONTROLS

3410 Monies in School Buildings
Monies collected by school employees and by student treasurers shall be handled according to diocesan Parish Business Practices. Contact Parish Review Services for specifics. If there are activities conducted in the school transacted with cash, that cash must be maintained under dual control (see Policy 3430) and deposited in parish accounts on a daily basis. The person responsible for the fund-raising activity should provide a weekly accounting report for the activity.
3420 Petty Cash
Petty cash should be kept to a minimum amount (depending upon the size of the operation), reconciled every month, kept under lock and key, a single individual (other than the person reconciling the account) must be responsible for the account, and it may be replenished as needed, when supported by the receipts. Petty cash should be used only when necessary.

3430 Cash Receipts
Whenever possible, there will be separate individuals assigned to the receipt of funds and the counting of funds. A separate individual should count the money, another should verify the amount of the deposit and both (unrelated to each other) should approve the deposit before submitting it to the business office.

3440 Cash Disbursements
Invoices should be approved by the appropriate school personnel and submitted to the business office for payment.

3450 Guidelines for Fund Raising Activities
Parishes are encouraged to practice stewardship. Multiple and numerous fund raisers can have an adverse effect on the life of a parish and on the practice of stewardship. Therefore, fund raisers should be minimized. Bingo, Texas Hold ‘em, Raffles, and other forms of gaming should be discouraged. Rather, parishes are encouraged to plan development activities that are community building, mission compatible and focused in terms of their fund-raising nature. Budgets should be submitted and approved by the Finance Council/School Board prior to any fund-raising activity. Handling of cash must always be done by at least two unrelated individuals.

Consult the web for guidelines from the State’s Gaming Dept. at http://www.mi.gov/cg. Refer to the Charitable Gaming Administrative Rules of Act 382. Parishes/Schools must obtain the proper gaming licenses and temporary liquor licenses to conduct these activities. State of Michigan Liquor and/or Gaming licenses should be signed by the Principal/Administrator and the Pastor/Canonical Administrator. A signed copy must be forwarded to the Diocesan Office of Catholic Schools.
3455 SCRIP and Other Incentive Programs that Promote For-Profit Organizations

Parishes/Schools are discouraged from offering incentives to purchase products or services from for-profit companies (i.e. SCRIP). Recognizing the popular nature of these programs and the desire to find creative ways to make Catholic education more affordable, this policy acknowledges the sacrifices and investment made by those who choose Catholic schools, while making a strong statement about the concerns surrounding this practice.

- Most notably, SCRIP programs present many challenges to financial accountability and good internal controls.
- SCRIP presents significant federal income tax issues that could jeopardize the tax-exempt status of the Parish/School if not carefully designed and executed.
- In many cases, they provide minimal benefit to the Parish/School given the resources necessary to operate these programs well.
- It is inadvisable for diocesan organizations to favor one company over another.
- It is impractical to determine the compatibility of every associated organization with our mission.
- Finally, it is a contradiction to encourage unnecessary spending, by way of broad-based incentive programs, as a means of making Catholic schools more affordable.

If a parish or school does wish to offer a SCRIP or similar program, prior approval of the superintendent’s office is required. Written approval is necessary and is dependent upon a Parish/School’s ability to adhere to Diocesan SCRIP Guidelines (see Addendum B).

3460 1099 Forms

All schools/parishes who pay more than $600 in a fiscal year to individuals or unincorporated independent contractors, must report such payments to the IRS on form 1099. The IRS requires all organizations to issue Form 1099’s to all individuals and independent contractors according to the rules set forth in IRS Publication 1828, The Tax Guide for Churches and Religious Organizations.

3470 Parish Business Manager

School principals must collaborate with the Pastor/Business Manager for the purpose of budget, financial reporting, internal controls, and fund raising.
3480 Sales Tax

The school, a 501(c)3 organization, qualifies as a sales tax-exempt entity. The exemption for sales to schools “not for resale” and for the school’s purchases “not for resale” are provided for in section 4 a (a) of the Sales Tax Act and section 4 (i) of the USE Tax Act. Purchases for personal consumption, such as catered meals, are not tax exempt. Sale of goods and services for personal use must include sales tax.
Personnel

ADMINISTRATIVE PERSONNEL

4060 Administrator/School Administrator
The Childcare-PreK-12 administrator is the administrator for the school and has the primary responsibility of providing instructional leadership while ensuring that the school is a Catholic ministry.

The administrator is responsible for fulfilling the duties defined in their job description, for compliance with all applicable federal, state, and local statutes, and for implementing the policies which have been recommended by the parish/local board of education and enacted by the pastor and is equally responsible for the faith development of students, faculty, staff and shall include parents in the educational process.

4064 Qualifications for an Administrator
The administrator must meet the qualifications as defined by an appropriate accrediting agency (MSNAA) and/or the qualifications defined by the Diocesan Office of Catholic Schools.

Diocesan qualifications for an administrator include:
1. The administrator will have appropriate administrative certification in the State of Michigan.
2. The candidate must have a current Life, Permanent, Professional or Continuing Teaching Certificate for the State of Michigan at the level of administration for which the candidate is applying.
3. A practicing Roman Catholic in good standing
4. Understands the structures, tenets and institutions of the Catholic Church
5. Willingness to obtain Advanced Catechist certification within five years
6. Final approval of the candidate by the Superintendent
7. Qualifications for certification may be temporarily or permanently waived by the superintendent under certain circumstances. Temporary waivers will be given a period of time, up to three years to meet certification requirements.
TEACHING STAFF

4110 Recruitment, Selection, and Assignment of Teachers
The recruitment, selection, assignment of teachers is the responsibility of the administrator with the approval of the pastor.

Teachers shall be selected on the basis of their qualifications and certification in accordance with Federal and State law, and the regulations of the Diocese of Grand Rapids for the assignment involved. All Catholic Schools in the Diocese of Grand Rapids will follow appropriate state and federal regulation.

Applicants for school employment who receive an offer of employment will be subject to a criminal history records check as described in Public Act 68 (1993), including fingerprinting.

4120 Non-Discrimination, Non-Harassment
The Diocese of Grand Rapids expects all employees to conduct themselves with dignity and respect for fellow employees, students and others. It is Diocesan Policy to treat all persons, including employees and applicants for employment according to their individual merit. Diocesan Policy prohibits any form of discrimination, harassment, joking remarks or other abusive conduct directed at an employee because of his/her sex, race, color, national origin, age, disability, protected genetic information, religion, veteran status, height, weight, marital status or other protected characteristic under applicable federal, state, or local law. Therefore, a school will not condone, nor will it tolerate, harassment, discrimination, or intimidation of any employee based on any of the foregoing. This policy applies to all employment practices, including recruiting, hiring, pay, placement, promotion, termination and all other terms and conditions of employment.

Sexual harassment specifically, may take many forms, including but not limited to the following:

1. Conduct that has the purpose or effect of unreasonably or substantially interfering with an individual's work performance or creating an intimidating, hostile or offensive work environment.
2. Employment decisions that are based on submission to or rejection of sexual advances or conduct.
3. Submission to a sexual advance or conduct that is either an explicit or implicit term or condition of employment.

An employee who believes he or she has been a subject of discrimination or harassment must immediately report it to the administrator or to the pastor if the employee cannot go to the administrator. An investigation of all complaints will be undertaken as soon as possible and to the extent possible will remain confidential. All personnel are expected to cooperate fully with any investigation. An employee found to violate this policy will be subject to disciplinary action up to and including immediate termination, depending on the circumstances.

Retaliation against an employee who reports discrimination or harassment, or who participates in an investigation of discrimination or harassment, will not be tolerated and will subject the offending employee to disciplinary action, up to and including immediate termination. An employee who believes he or she has been the subject of retaliation should immediately report it to the administrator or to the pastor if the employee cannot go to the administrator.

4130 Religious Standard in Employment
Teachers and principals hired to serve in our Catholic schools are expected to be Catholics in good standing. Exceptions can be made in extraordinary circumstances with the approval of the pastor and superintendent. The distinctive and unique purpose of the Catholic schools is to create a Christian educational community that is enlivened by a shared faith among administrator(s), students and parents.

Teachers and principals are expected to spread the Catholic faith and supervise/participate in religious ritual and worship in propagation of that faith, including the observance and conduct of liturgy. As such, teachers and principals occupy a position and share duties of religious significance that is connected and important to the Diocesan doctrinal mission.

All Catholic school leaders and teachers in the Diocese of Grand Rapids are considered ministerial employees and have the responsibility of teaching and witnessing the Catholic faith in a way that is consistent with our Christian beliefs.
This is what makes our schools truly Catholic. Working with young people in our Catholic schools is a privileged ministry that requires full support of the teachings of the Catholic Church. The teachers and administrators employed in the schools of the Diocese must have knowledge of and a respect for the Catholic faith and a commitment to Christian living.

Our schools are tasked with carrying out the mission of the Church, and that means that our teachers cannot be known to be persisting in any behavior or commitment objectively incompatible with Catholic moral teaching; that includes behavior in their professional or private lives. This is an expectation set forth clearly in the Memorandum of Understanding signed by all faculty members. It states:

“The Employee, as an employee in a Catholic educational institution, agrees that as a condition of employment he/she will support and exemplify in conduct both Catholic doctrine and morality as articulated in the Catechism of the Catholic Church. He/she must be consistent, in expression and example, with the teaching and practice of the Catholic faith and shall not advocate, encourage or counsel beliefs or practices that are inconsistent with the Catholic faith.”

It is important that employees who give public witness inconsistent with this agreement be treated with great care and respect, while being encouraged to live faithfully according to Christian teaching. Those who persist in inconsistent public witness are not able to carry out a teaching ministry in a Catholic school of the Diocese of Grand Rapids.

Each school shall publish this policy in their faculty and staff personnel handbook, and shall provide each school leader and teacher ready access to the Catechism of the Catholic Church where Church teachings are clearly articulated and easily indexed for quick access complete with biblical references.

4131 Teachers of Religion
All teachers of religion in the schools of the diocese, including those involved in sacramental preparation, must be Catholic and are considered ministerial employees whose duties and responsibilities have religious significance as described in Policy 4130.
4132 Professional Growth and Development – Faculty/Staff
Continuing professional development is essential for all members of a school staff.

Teachers must keep abreast of current pedagogical techniques and educational research through reading and continuing education opportunities such as seminars, conferences, and workshops. The school administrator should build into the school budget monies to help pay for professional growth opportunities. The administrator will inform employees of workshops and seminars that are available, and what financial assistance can be provided.

4133 Faith Development Program for Staff
All administrators and teachers must participate in the Catechist Formation and Certification program offered by the Diocese of Grand Rapids and specified in the following policies and implementation guidelines as they apply to schools.

4134 Catholic School Teacher and Administrator Catechetical Certification
Every administrator and teacher in a Catholic school will be certified or in the process of obtaining certification by the Office of Faith Formation of the Diocese of Grand Rapids (Canons 804, 805).
All teachers teaching in a Catholic School in the diocese are to obtain Diocesan Certification within 2 years of their employment with Catholic Schools. They are expected to renew their certification every three years as well as work toward Advanced Certification (80 formation hours). Catholic high school religion teachers are required to have a Master Catechist level of certification. All administrators of Catholic Schools in the diocese are to obtain Advanced Catechetical Certification within five years of their employment.

IMPLEMENTATION

TEACHERS IN CATHOLIC GRADE SCHOOLS
1. Every teacher, employed in a Catholic school, will be certified, at a minimum, having Diocesan Certification. This must be renewed every three years with 5 hours of formation needed for each three years.
2. It is the responsibility of each teacher to keep updated in their certification.
3. It is recommended that teachers work toward Advanced Certification as well as Master Catechist.

RELIGION TEACHERS IN CATHOLIC HIGH SCHOOLS
1. Catholic high school religion teachers are required to have a Master Catechist level of certification. This must be renewed every five years with 5 hours of formation needed for each five years.
2. It is the responsibility of each teacher to keep updated in their certification.

ADMINISTRATORS IN ELEMENTARY AND SECONDARY CATHOLIC SCHOOLS
1. All administrators of Catholic Schools in the diocese will have, at minimum, an Advanced Catechetical Certification. Advanced Certification must be renewed in three years, with five hours of formation needed for each of the three years.
2. It is the responsibility of each administrator to keep updated in their certification.

4135 Continuing Education, Administrators
It is the administrator’s responsibility to maintain professional certification or maintain the standard of the Michigan Association of Non-public Schools and/or the Diocese of Grand Rapids for school leadership. It is likewise the administrator’s responsibility to improve their professional and administrative abilities by participating in appropriate professional development activities.

The administrator will participate in Diocesan required professional meetings, workshops, and other in-service training which are appropriate to the position held.

It is recommended that administrators be provided additional opportunities for professional growth and development, and that monies be provided in the budget for such.

4140 Certification – Secondary and Elementary
Catholic school teachers must comply with the teacher certification requirements of the State of Michigan.
All teachers are required to provide proof of Michigan certification prior to being offered employment, or documentation that Michigan certification will be forthcoming. Teachers are required to maintain their state teaching certification.

4141 Shared Time Program
It is expected that a shared time candidate will be qualified by training and experience for the position under consideration, and will exhibit the character, values, actions, and conduct consistent with the mission of diocesan schools and the teachings and tenets of the Roman Catholic Church. In addition, it is expected that shared time faculty be held to the same performance standards as other faculty employed by diocesan schools.

Shared time faculty shall be provided by the public school district(s) pursuant to a shared time agreement approved by both the diocesan schools and the district.

4150 Reduction of Teaching Staff
All teachers are employed on an at-will basis, meaning either the teacher or the school are free to terminate the relationship at any time, with or without cause and with or without notice. Teacher staffing needs are determined at the sole discretion of the administrator.

When the school needs to reduce the number of teachers, the administrator should use these guidelines to make this decision (the following is not a priority listing):

- Contribution to the development of the faith community
- Degree of teaching competency and commitment
- Academic qualifications/certifications
- Attitude and cooperation
- Degree of compliance with school policies
- Subject/grade level taught
- Dedication to and positive leadership within the school/parish
- Involvement in school extra-curricular activities

Staffing Changes are made in consultation with the pastor/canonical administrator. No staffing changes will be made on the basis of an individual’s protected characteristics under applicable state, federal, or local law.
EMPLOYMENT

4200 Annual Memorandum of Understanding
All lay administrators and teachers shall sign the annual Memorandum of Understanding provided by the Diocesan Office of Catholic Schools. The administrator or teacher serves at the discretion of the school in an at-will capacity. The school administrator and pastor sign the teacher Memorandum of Understanding. In the event that the administrator is unable to sign the Memorandum of Understanding, the pastor may assign an interim administrator for that purpose.

4210 Equal Employment Opportunity

The Grand Rapids Diocese is fully committed to a policy of equal opportunity in its employment practices. The Diocese supports and complies with all applicable state, federal, and local laws prohibiting discrimination in hiring, training, promotion, compensation, benefits, layoff or other conditions of employment on the basis of race, color, age, sex (including pregnancy), religion, national origin, disability, protected genetic information, height, weight, marital status, protected veteran status or any other protected category under applicable federal, state or local law.

It should be recognized, however, that there are certain positions, which require membership and active participation in the Roman Catholic Church in order to fulfill the responsibilities of the position; consequently, for certain positions, religious affiliations or beliefs will not be a protected non-discrimination category under the ministerial exception.

4211 Termination of Employment

All school administrators, teachers, and staff serve at the discretion of the school. The relationship is at-will, with either party being free to terminate the relationship at any time, for any reason, with or without notice. In order to limit liability and assure legal compliance, it is the responsibility of the pastor or administrator, to consult with the Office of Catholic Schools as far in advance as possible before the termination of a school employee.
**4212 Exit Protocol**

If a staff member voluntarily terminates employment, a letter of resignation signed by the terminating employee should be requested and placed in his/her personnel file.

In all cases of separation, employees must immediately return all school property, materials, or written documents issued to them or in their possession or control. All electronic access should be terminated and passwords should be retrieved for all school-related accounts.

An exit interview is recommended for all voluntary employment separations.

**COMPENSATION AND RELATED BENEFITS**

**4220 Compensation Policy**

When determining compensation for school employees, the school should strive to provide compensation that compares favorably with other similar organizations within and outside our community, for similar work under similar conditions. Compensation is periodically updated based upon market demand and other relevant factors such as the level of education, positive experience, responsibility of the position, [parish] budget considerations and compensation for other [parish] employees.

**4230 Compensation Schedules/Norms**

Compensation schedules should be reviewed each year in an effort to move toward diocesan norms (averages) that are provided in the Diocesan Annual Statistical Report. These norms provide general guidance on a wage to school employees and for the sustainability of our schools. Diocesan norms will include a range of high, medium and low salaries. Compensation adjustments should be made based upon performance assessment, leadership, academic degree, diocesan norms, and school/parish budget considerations. Compensation in the form of fringe benefits must be provided by Michigan Catholic Conference.
4240 Compensation for Members of Religious Communities
Compensation is ordinarily determined in consultation with the Religious Institute, Congregation or Order. The Religious Community sends its financial information directly to the parish/institution. Financial arrangements are handled with the Administrator or Pastor.

4270 Benefits Available through Michigan Catholic Conference
The following constitutes a summary of benefits available through the Michigan Catholic Conference subject to the terms and conditions of the applicable plans. The actual terms of the benefit, contained in the plan documents, are available for review and shall govern in the event of any discrepancy between this summary and the plan documents.

Schools are required to be uniform in the administration of benefits provided to employees.

Health-Medical Insurance
1. All full-time employees are eligible to participate in the Michigan Catholic Conferences Health/Medical Insurance Program subject to the terms and conditions of the applicable plans. Eligible employees are active full-time employees working at least 20 hours a week.
2. Schools are not required to pay any portion of health insurance for employees working 29 hours or less per week.
3. For employees who work more than 29 hours per week, the employing parish/school pays at least 60% the employee’s portion (single coverage) of the cost of affordable coverage as defined by MCC.
4. Employees may waive in writing annually participation in the Michigan Catholic Conference Health/Medical Insurance Program.

Retirement Compensation
Membership in the Michigan Catholic Conference Retirement Plan is mandatory for all lay employees, (working 20 hours or more for five or more months in a calendar year), of the seven dioceses of Michigan, employed in parishes, schools or other diocesan institutions under the direct jurisdiction of the Bishop. All rights and benefits will be governed by the terms of the Retirement Plan, and are subject to future amendments or modifications.
Lay employee participation in the Retirement Plan is paid for by the employer.

**Unemployment, Social Security, Worker’s Compensation**

The school shall maintain Unemployment Insurance and worker's compensation insurance coverages in accordance with state and federal statutes.

**Other Benefits**

Schools may opt to provide additional benefits as offered by the Michigan Catholic Conference.

**PERSONNEL RECORDS**

**4300 Personnel Records**

A cumulative personnel record for all staff will be maintained by the school administrator. The personnel record will contain the required contents as listed in Policy #4301, and may contain additional items as listed in the guidance from the USCCB Guidelines contained in Addendum D. Eligibility verification form (I-9), medical information, and benefit and tax information are maintained separately from the personnel file normatively with the business manager. The personnel records are the property of the school.

Personnel records are confidential and available only to the employee and appropriate supervisory personnel. Information is not released to outside organizations on present or former employees without authorization from the individual employee, except as allowed or required by law. It is the responsibility of the employee to keep the school advised of current address, phone number, and emergency contact information.

Individual personnel files are available for review by the employee provided the request is timely and reasonable, and the viewing of the file is done during regular business hours in the presence of the school administrator or designee. Contents of personnel records are maintained according to the retention schedule provided in the USCCB Guidelines.
4301 Required School Employee File Contents for Administrators/Teachers

- Resume (Address, Grades/Subjects Taught, Extra Curricular Participation, Awards, Special Recognition)
- Employment Application
- Transcripts (Indicating Graduation and Appropriate Education Degree)
- Placement Credential File
- Administrator Certification (current/valid): Copy both sides or waiver from the diocesan Superintendent (if applicable)
- Teaching Certificate (current/valid) Copy Both Sides
- Catechist Certification
- Verification of VIRTUS/Protecting God’s Children Training
- Memorandum of Understanding
- Employee Handbook Acknowledgement Form
- Criminal History Check (LiveScan Authorization Form Only). Results are to be placed in the appropriately regulated fingerprint file/location
- Standards of Ministerial Behavior Form - signed by employee
- Unprofessional Conduct Check
- Emergency Contact Information
- Record of Continuing Professional Development
- Records of Administrative Observations
- Evaluation Forms
- Disciplinary Records (including corrective actions)
- Annual Attendance Record
- Employment Eligibility Verification (Form I-9) – Immigration Reform and Control Act (This form should be kept by the payroll officer/business manager separately from the school personnel file). For employees, whose employment has ended, the I-9 Forms and accompanying documentation must be retained for 3 years from date of hire or 1 year after employee leaves, whichever is longer.

Substitute Teachers/Other School Personnel

- Resume – Teacher Data Information (address, etc., grades/subjects taught, extracurricular participation, awards, special recognition)
- Employment Application
• Transcripts (indicating graduation and appropriate education degree where applicable)
• Teaching Certificate/Permit – Copy both sides (if applicable)
• Verification of VIRTUS/Protecting God’s Children training
• Standards of Ministerial Behavior (signed)
• Criminal History Check (LiveScan)
• Unprofessional Conduct Check
• Emergency Information
• Employment Eligibility Verification (Form I-9) – Immigration Reform and Control Act (this form should be kept by the payroll office/bookkeeper separately from the school personnel file).

For employees, whose employment has ended, I-9 forms and accompanying documentation must be retained for 3 years from the date of hire or 1 year after employee leaves, whichever is longer.

**4310 Social Security Number Privacy**

All employees must provide their social security numbers to the school for tax reporting. Schools must be committed to protecting the confidentiality of these and other social security numbers that are obtained by anyone in the course of school business. Documents containing a social security number will be kept in confidential files, such as employee personnel files and payroll records for which access is limited and which are treated as confidential. Except as required for necessary and legitimate business purposes, no employee is permitted to have access to social security numbers or to keep, view, use, copy, share or distribute another person’s social security number, or in any other way disclose another’s social security number.

Access is limited to those persons who have a need to know, and only to those persons. Employees with this limited access must take care to not openly reveal social security numbers on computer screens or on their desks. Anyone with access to a social security number for necessary and legitimate business purposes may not use it for any other purpose, and may not allow any unauthorized individual to obtain it.

When a document containing a social security number is no longer needed and is to be discarded, the document must be disposed of in a manner that ensures the confidentiality of the social security number. Documents must be shredded or
electronically destroyed, or otherwise disposed of in a way that prevents unauthorized disclosure of a social security number.

The schools must comply with the Michigan Social Security Number Privacy Act, PA 454 of 2004.

Violation of this policy is subject to corrective action, up to and including discharge.

4320 Personnel Policy Manual
Each school shall provide employees with a School Personnel Policy Handbook containing policies and procedures consistent with the Diocese of Grand Rapids Office of Catholic Schools Personnel Policies. To the extent that any provision of a School Personnel Policy Handbook is inconsistent with these Personnel Policies, these Personnel Policies shall prevail. Nothing contained within the School Personnel Policy Handbook shall create any employment relationship other than an at-will relationship.

4330 Health-Infectious Diseases
Medical records for students are considered educational records. The administrator is to notify the Office of Catholic Schools immediately in the event any employee or student is identified as having a serious communicable or infectious disease.

The administrator will work with the Office of Catholic Schools, the pastor, family, and physicians in developing an appropriate course of action.

Reports, records, data and information regarding a serious communicable or infectious disease is, in most instances, confidential and subject to limited disclosure.

ABSENCES FROM WORK

4340 Jury Duty
Employees called to serve on juries shall suffer no loss of regular income or other benefits. Such employees will receive regular pay reduced by the amount of the per diem allowance received from the court.
Since jury duty does not normally necessitate full-time absence from work, the employee is expected to fill his/her school position’s requirements (i.e. lesson plans, grading, parent communications, conferences, afterschool commitments). Should there be unusual circumstances, the employee should discuss accommodations with his/her administrator.

4350 Absences/Sick Leave
Eligible employees shall be granted sick leave benefits in accordance with the applicable requirements of the Family Medical Leave Act and the Michigan Paid Medical Leave Act, if applicable, as detailed in the School Personnel Policy Handbook.

4360 Bereavement
Eligible employees shall be granted bereavement leave benefits in accordance with the School Personnel Policy Handbook.

4370 Personal/Business Days
Eligible employees shall be granted Personal/Business Day benefits in accordance with the School Personnel Policy Handbook. Personal days are granted at the discretion of the administrator.

4380 Short Term Leave of Absence
Eligible employees shall be granted Short Term Leave of Absence benefits for specific purposes in accordance with the School Personnel Policy Handbook. An employee on a valid leave of absence is not eligible for unemployment benefits.

If applicable, schools of the Diocese will comply with the provisions of the Family and Medical Leave Act, as amended.
STAFF

4390 Evaluation of Teaching Personnel
A formal performance evaluation of each staff member shall be conducted annually by the administrator or designee. A written report will be signed by the staff member and placed in the personnel file. A copy of the written report will be provided to the employee.

4395 Administrator Evaluation
Each administrator shall be formally evaluated annually, under the direction of the Pastor/Cannonical Administrator or in the case of an independent Catholic school by the Board Chair. The Diocesan Office of Catholic Schools Administrator Appraisal Process should be used.

4420 Substitute Teachers
The administrator of the school shall engage a qualified, state approved substitute teacher in the absence of the regular classroom teacher. Substitute teachers are subject to the same certification requirements, background checks and fingerprinting as regular classroom teachers, as required by Michigan law.

4430 Student Teachers (Directed Teaching Experience)
Student teachers must be enrolled in a state approved college or university directed teaching program.

4440 Paraprofessionals
Persons employed in a non-lead instructional capacity need not be certified as teachers. Any personnel used in a lead instructional capacity must hold an appropriate teaching certificate issued by the State Department of Education.

Teacher aides and other paraprofessionals are subject to criminal background checks and fingerprinting as required by Michigan law.

4450 School Bus Drivers
All school bus drivers are to be properly licensed and meet all state requirements. All school bus drivers are subject to criminal history records check, FBI fingerprinting and a motor vehicle records check. Consistent with the at-will nature of the employment relationship, the administrator and pastor have the
discretion to reject any bus driver candidate for any lawful reason, including reasons based on consideration of his/her motor vehicle record and/or insurance risk.

**4460 Secretarial/Clerical Staff**

Provision should be made for secretarial or clerical assistance for the administrator in all schools of the diocese. All secretarial and clerical employees are subject to a criminal history records check and fingerprinting as required by Michigan law.

Secretarial and clerical employees shall meet the requirements of the job as determined by the administrator.

**4470 Custodial and Maintenance Staff**

It shall be the responsibility of the pastor and/or the administrator to engage a qualified custodial staff for the school and provide a detailed position description. Each school shall have a qualified custodial staff sufficient to maintain the school in a safe, clean and attractive condition.

Individuals who are also responsible for boiler operation shall be properly trained and certified according to local or state requirements.

The custodian(s) are supervised by the administrator and/or pastor for any school-related work they perform.

Custodians and maintenance staff are subject to criminal history records background checks and fingerprinting as required by Michigan law.

**BACKGROUND CHECKS**

**4500 Criminal Background Check**

All full-time or part-time employees of the school or those assigned to regularly and continuously work under contract in the school are required to have a criminal history record check conducted by the Michigan State Police and the Federal Bureau of Investigation pursuant to federal and state law.
4510 Waiver for Continued Employment

Employees who have been arraigned/charged with a crime and failed to disclose within the three days required by statute, are subject to termination. Employees who have been convicted of a non-listed offense may be granted a waiver for employment. The waiver may only be granted by the pastor or canonical administrator and must be signed and placed in the appropriately regulated fingerprint file/location.

SOCIAL MEDIA

4520 Social Media Policy

Social Media is now the fastest growing form of communication in the United States, and it is transformational:

“New technologies are not only changing the way we communicate, but communication itself, so much so that it could be said that we are living through a period of vast cultural transformation. This means of spreading information and knowledge is giving birth to a new way of learning and thinking, with unprecedented opportunities for establishing relationships and building fellowship.

I would like then to invite Christians, confidently and with an informed and responsible creativity, to join the network of relationships which the digital era has made possible. This is not simply to satisfy the desire to be present, but because this network is an integral part of human life. The web is contributing to the development of new and more complex intellectual and spiritual horizons, new forms of shared awareness. In this field too we are called to proclaim our faith that Christ is God.”

(Truth, Proclamation and Authenticity in the Digital Age – Message of Pope Benedict XVI for the 45th World Communications Day – June 5, 2011)

Social Media thus presents the Diocese of Grand Rapids, and the Catholic Church generally, with new, and previously unheard of opportunities to “go
forth and make disciples of all nations.” But it also creates challenges, particularly with respect to message integrity, source or authorship confusion, and protection of the vulnerable such as children and youth.

This Social Media Policy is directed at maximizing for the Diocese new opportunities made possible by Social Media, while at the same time doing everything reasonably possible to meet those opportunities and related challenges. All Clergy, Employees and Volunteers of the Diocese are expected to adhere to the policy directives outlined here.

DEFINITIONS:

**Bishop:** Most Reverend David J. Walkowiak, J.C.D., and his duly consecrated and ordained successors.

**Affiliate:** any juridic person within the Diocese, including without limitation any diocesan parish, cemetery, school, or organization officially sponsored by the Diocese.

**Cleric or Clergy:** a person(s) ordained with holy orders under the auspices of the Diocese and directly accountable to the same, for example, a priest or deacon.

**Diocese:** the Roman Catholic Diocese of Grand Rapids, Michigan.

**Diocesan Website:** a Social Media network page, Blog or any website or tool created by a Cleric, Employee or Volunteer of the Diocese for the purpose of conducting the affairs of the Diocese or registered in the name of the Diocese.

**Parish Website:** a Social Media network page, Blog or any website or tool created by a Cleric, Employee or Volunteer of the Diocese for the purpose of conducting the affairs of a diocesan parish or registered in the name of a diocesan parish.

**Affiliate Website:** a Social Media network page, Blog or any website or tool created by a Cleric, Employee or Volunteer of an Affiliate for the purpose of conducting the affairs of an Affiliate or registered in the name of such Affiliate.
**Personal Website:** a Social Media network page, Blog or any website or tool created by Cleric, Employee or Volunteer of the Diocese for personal purposes, i.e., purposes other than conducting the affairs of the Diocese or Affiliate and not registered in the name of the Diocese or Affiliate.

**Blog:** a type of website used primarily to offer commentary on specific events or subjects and to facilitate discussion, i.e., a form of web-based dialogue. "Blog" is also used as a verb to describe the act of offering commentary on such a site.

**Micro-blog:** blogging with size constraints typically by posting frequent brief messages about personal activities. Most examples include text updates, and photo or audio clips, for either general or limited distribution.

**Web 2.0:** web applications that facilitate interactive information sharing. Contrasts with non-interactive websites which permit only passive viewing of information.

**Social Media:** all interactive platforms of electronic communication (such as Snapchat, Instagram, Facebook, Twitter, Reddit, MySpace, YouTube or any personal blog, website, or chatroom) through which users create online communities to share information, ideas, personal messages, and other user generated content.

**Social Media Presence:** a Blog, Micro-blog, Web 2.0, web page, Social Media channels, e-mail account, or any similar vehicle that facilitates internet communication of any kind.

**Supervisor:** a hiring or supervising agent: for parish staff, the pastor; for parish Volunteers, the pastor or appropriate administrator (including without limitation a director of religious education or a director of youth ministry); for school personnel, the principal or assistant principal.

**Employee:** any person employed by the Diocese or an Affiliate, not excluding Clergy.
Adult: a natural person who is 18 years of age or older.

Vulnerable Adult: persons 18 years of age or older, with physical, mental, emotional or behavioral conditions, including:

- Adults with an illness, or situation that renders an inability to defend, protect or get help when injured or abused.
- Individuals whose condition or disability impairs their ability to provide adequately for their own care.
- Adults who habitually lack the use of reason.
- Individuals who have a court appointed guardian.
- The elderly, whose various circumstances might make them susceptible to persons or situations that cause them harm.
- Individuals who are residents or patients within hospitals, group homes, nursing homes, day service facilities, day activity centers, Adult foster-care homes, or an Adult who receives care services from a licensed home care or personal care service within their own home.

Child: a natural person who is not 18 years of age or older.

Volunteer: a natural person who works without financial or material gain on behalf of the Diocese or an Affiliate (including without limitation an intern, catechist, scout leader, coach, student teacher and others in similar capacities).

SOCIAL MEDIA POLICY:

I. Policy Coverage.

The Diocese recognizes that Clerics, Employees and Volunteers use the internet to conduct the affairs and pursue the mission of the Diocese and its Affiliates; the Diocese supports and encourages this practice. It does so with the expectation of newfound missionary success. All who pursue the Diocese's mission on the internet must remain mindful, however, that they are the face of the Diocese to a now much broader world, and must therefore take care to represent the Diocese in a Christ-like way. This means, of course, avoiding any comments or conduct that might reflect poorly on the Diocese or the Catholic
Church, go against (or “run contrary to”) Catholic teaching, damage the reputation or stature of the Diocese or Catholic Church, or that would harm or reflect poorly on the people who work for and serve the Diocese or the Catholic Church.

The Diocese reserves the right to change this policy at any time at its sole discretion.

II. Authorization.

Christ said: "He who hears you, hears me." (Luke 10:16)

- To be heard on the internet, however, is not simple or easy. Being heard requires those who would be heard to consider and act on the following: The relative strengths of the various forms of Social Media (Blogs, texts, networks, etc.);
- The needs of the ministry;
- The need for sustained input and updating, to provoke interests and to make one's message stand out;
- The need for a carefully thought-out search engine optimization strategy; and
- The need to combine Social Media with face-to-face and other traditional forms of interaction.

Competition for attention on the internet is fierce and success goes to those who plan carefully, think clearly and work diligently. Absent this kind of commitment and execution, Social Media is likely to be unproductive or even counterproductive. This suggests that Social Media proposals be carefully planned, vetted and approved prior to activation.

Therefore, no Diocesan Website or Diocesan Social Media Presence may be created or activated absent prior approval in writing by the Bishop (or by such person designated by the Bishop in writing). No Affiliate Website or Social Media Presence may be created or activated absent prior approval in writing by the parish priest or Supervisor.

Personal Websites and personal Social Media Presences may be created and activated by Clerics, Employees and Volunteers without diocesan approval.
Clerics, Employees and Volunteers shall not, in a Personal Website or personal Social Media Presence (i) disclose information held in confidence by, or that is proprietary to, the Diocese, Affiliates or the Catholic Church, (ii) use trademarks or logos of the Diocese, Affiliates or the Catholic Church, or (iii) disparage, slander or make false statements about the Diocese, Affiliates or Catholic Church.

III. Transparency, Honesty and Discretion in the Use of Social Media.

Employees and Volunteers are responsible for the information they post on Social Media and are subject to the following rules when posting information in connection with the Diocese or an Affiliate:

- Diocesan or Affiliate computers and time on the job are reserved for diocesan or Affiliate affairs and ministries.
- Do not claim to represent the official position of the organization or the teachings of the Church unless authorized to do so by an appropriate Supervisor or administrator.
- Do not include any information about any person or entity that is confidential. Adhere to all Diocesan or Affiliate privacy and confidentiality policies. Employees and/or Volunteers who share confidential information do so at the risk of disciplinary action or termination.
- Do not disclose information protected from disclosure by law, such as medical information about third parties or a third party's social security number.
- Be mindful of the copyright and intellectual property rights of others. When in doubt about such matters, seek assistance from a Supervisor before acting.
- Be familiar with and obey all terms of service, privacy policies and settings for the Social Media platform used.
- Think twice before posting or sharing. Think about what might happen if the information becomes public. In cases of doubt, seek assistance from a Supervisor before acting.
- Ensure that all content and links comply with the Children’s Internet Protection Act which, among other things, prohibits content that is obscene, pornographic, or otherwise harmful to minors (https://www.fcc.gov/consumers/guides/childrens-internet-protection-act).
- Take care when posting photographs. Consult the Diocese or Affiliate’s media release
policy prior to posting or sharing images. Make sure that the subject has signed a media release form and it is on file before posting their picture.

- Strive for accuracy. Get the facts straight before posting or sharing. If you make a mistake, correct it quickly.

IV. Accountability.

Each approved Diocesan or Affiliate Website or Diocesan or Affiliate Social Media Presence must have at least two site administrators, a primary and a back-up, who can and will monitor and, if necessary, respond in a timely manner, to communications on the site. All such administrators must be Adults, must be identified by name in the website proposal and then on the website itself, and must have been screened and background checked, in the manner established by the Diocese for all Employees and Volunteers. Passwords and names of websites must be maintained in a secure location (which must be disclosed in the website proposal) and more than one Adult must have 24-hour access to this location.

V. Official Sponsorship.

Digital communications relating to Diocesan or Affiliate business or affairs may be transmitted only through internet services (e.g., email accounts or Social Media accounts) owned by or registered to the Diocese or the Affiliate. In furtherance of this policy:

1. Every Affiliate, to the extent that it has a website or Social Media Presence, must have its own self-identifying domain (e.g., website address or URL).
   - Example: www.hsparish.org for Holy Spirit Parish

2. Any electronic communication emanating from the Diocese or an Affiliate must be on an officially sponsored domain of the Diocese or the Affiliate.
   - Example: Secretary@hsparish.org, Info@hsparish.org

- All Affiliates must eliminate the use of free domains such as Gmail, Hotmail, Yahoo! and other such services not registered to the Diocese or the Affiliate. This will help establish the authenticity of diocesan and Affiliate correspondence and reduce the potential for misrepresentation or
3. Email accounts or Social Media accounts owned personally by Clerics, Employees, or Volunteers may not be used for official Diocesan or Affiliate communications.

4. Diocesan and Affiliate communications are to be archived in a manner consistent with established Diocesan or Affiliate practices and policies.

5. Diocesan and Affiliate Websites must incorporate a conspicuous code of conduct for visitors to the page. If the website administrator encounters anyone not abiding by the code of conduct, he or she must take immediate and appropriate action as established by the Diocese or Affiliate Code of Conduct and Acceptable Use Policy.

VI. Adult Electronic Interaction with Minors.

Electronic communication with minors must not be undertaken lightly. School, parish and other Affiliate Employees and Volunteers must consistently adhere to Catholic values and transparency with respect to such communications.

Many Web 2.0 tools commonly used for instruction and communication have Social Media components to them which allow for sharing, collaboration and commenting. Some of these sites can be set up for a particular group, thus limiting comments to recognized participants. Others are more public in nature, allowing interaction from a wider audience.

1. All internet communications with minors must be undertaken in conformity with:


   • The Children’s Online Privacy Protection Act (http://www.ftc.gov/ogc/coppa1.htm)

   • The Diocesan Office of Child and Youth Protection policies (http://www.dioceseofgrandrapids.org/documents/child_youth_standard_s_mi_nisterial_behavior_8-14.pdf)

2. Adults must not be in electronic communication with minors unless the parents/guardians have authorized the communication.
• Such authorizations can be accomplished, for example, at the beginning of a school year on forms presented to all parents as part of the enrollment process, or if need be on a case-by-case basis.

3. All Adults who communicate with a minor via the internet must practice ‘due care.’ Due care refers to the level of judgment, care and prudence a person would reasonably be expected to use under particular circumstances, to avoid harm to the minor.

4. Schools receiving federal funding for computer technology through E-Rate must comply with the Children's Internet Protection Act (CIPA) (https://www.fcc.gov/consumers/guides/childrens-internet-protection-act) 47 U.S.C. § 254(h)(5), which requires monitoring internet use by minors; the use of filters to restrict access to obscenity, child pornography or other material harmful to minors; and educating minors about appropriate online behavior, social networking safety and cyberbullying.

VII. Adhering to the Church's Doctrines and Teachings and to Diocesan/Affiliate Policies and Guidelines.

The content of electronic communications must not be at variance with the doctrinal and moral teaching of the Catholic Church. All communication by means of Social Media by Diocesan or Affiliate Employees or Volunteers is a reflection on the Diocese, its Affiliates, as well as on the Catholic Church generally. As a result, this communication must be representative of the policies and practices of the Diocese of Grand Rapids. The following rules have been adopted to support the foregoing policy:

1. Write in thoughtful language consistent with the message of the Diocese of Grand Rapids and the Catholic faith.

2. Do not use insults, slurs, or obscenities. Do not post anything that might be viewed as pornographic, proprietary, harassing, abusive, or creating a hostile work environment.

3. Do not disparage other individuals, other community groups, or other faiths.

4. Understand that electronic communications and Social Media activities are subject to other personnel policies, including non-discrimination/non-harassment and electronic communications policies.
5. Report Social Media activities that potentially violate this policy.
CURRICULUM AND INSTRUCTION

5000 Curriculum
The Diocese of Grand Rapids defines academic standards that identify learner outcomes. The curriculum is developed and implemented at the school and classroom levels, aligned with diocesan standards. The local school curriculum objectives encompass all the learning experiences (cognitive, psychomotor, affective) that are planned and directed by the school. The curriculum develops the student’s responsibility to God, self, home, church, community, country, world and other persons. Diocesan standards and school-level curricula are available upon request.

The curriculum shall uphold the values, morals and teachings of the Catholic Church. It should be broad in scope and in accordance with the mission of the school.

5005 Catholic Identity and Culture
The mission and identity of Catholic schools is at the heart of the mission of the Catholic Church. Jesus himself commissioned the disciples to, “Go, therefore, and make disciples of all nations, baptizing them in the name of the Father, and of the Son, and of the Holy Spirit, teaching them to observe all that I have commanded you” (MT 28: 19-20a). Catholic schools are a primary means by which the Church passes on the Faith from one generation to the next. Therefore, all curriculum and instruction, regardless of the discipline, is illuminated by the teachings of Jesus Christ as taught by the Catholic Church in the Catechism of the Catholic Church.

Catholic educational culture by design addresses the whole person - body, mind, and spirit. As such, our culture nurtures these foundational principles:

- All people are created in the image and likeness of God
- God has a plan for each of us
- God has gifted each us for a purpose greater than ourselves
- God wants us to develop and use our talents as good stewards of His gifts
- We value and partner with parents as the primary educators of their children
We reverence goodness, truth, and beauty in one another and in all of creation
We teach right and wrong, good and bad and learn to discern the difference
We strive to cultivate a personal encounter with Christ
We nurture relationship with Christ through prayer, sacred scripture, the sacraments, and service
We strive to become disciples that go and make disciples

5020 Review of Diocesan Standards
In consultation with professional educators, including teachers and administrators, the Office of Catholic Schools will review and update standards on a regular basis.

5030 Childcare and Preschool Licensing
Childcare and pre-school programs shall meet the licensing regulations required by the State of Michigan.

5044 Instructional Materials and Program Adoptions
The selection of instructional materials is the responsibility of the local school administrator, in consultation with the faculty. Materials must be in accord with the teachings of the Catholic Church and the Diocesan Standards.

Catechetical Textbooks in Parishes and Catholic Schools
Textbooks and materials for catechetical programs for elementary age students, middle school and high school age youth in parishes and Catholic schools will be selected from the “Conformity Listing of Catechetical Texts and Series” approved by the US Conference of Catholic Bishops.

Implementation
1. The selection of catechetical textbooks for use in the parish and Catholic school is the collaborative responsibility of the Parish Catechetical Leader and the Principal under the guidance of the Pastor.
2. In regional or private Catholic elementary schools, the responsibility for the selection of catechetical textbooks is the responsibility of the Principal in consultation with the Pastor(s).
3. In regional, private, inter-parish, or parish Catholic high schools, the selection of catechetical textbooks is the responsibility of the Religion Department Chairperson with the approval of the Principal.

4. Resources and textbooks not listed on the “Conformity Listing of Catechetical Texts and Series” may be used as a supplement to the approved textbook in use for catechetical programming in effort to fully learn and put into practice the object of a lesson. Textbooks that are being used as a supplement to the primary approved textbook, but are not listed on the “Conformity Listing of Catechetical Texts and Series” must have an imprimatur.

5. The staff of the Diocesan Office for Faith Formation, including the Office for Family, Youth and Young Adults, are available to assist parishes and Catholic schools in the selection of approved catechetical textbooks.

5050 Curriculum Components
Curriculum shall encompass, but not be limited to, the following:

- Religion and Family Life
- Career and Employability Skills
- Fine Arts
- Language Arts
- Mathematics
- Physical Education and Health
- Science
- Social Studies
- Technology
- World Language

5055 Catechetical Instructional Time Allotment in Parishes and Catholic Schools
Parishes and Catholic schools integrate into catechetical programs the proclamation of Christ’s message, the nurturing of community, opportunities for participation in worship and prayer, and the motivation for service - all of which includes a certain minimum amount of time allotted to a systematic study of the Catholic Faith.

Parish Catechetical Programs, K-8
Parish Catechetical programs are based on a minimum of 30 weeks per year and/or a minimum of 30 clock hours of instruction per year.

**Parish Catechetical Programs, 9-12**
While the same instructional time allotted for a systematic study of the Catholic Faith, in terms of clock hours, applies to the high school catechetical program in the parish setting, this may vary due to the format of some programs which integrate the catechetical component into youth ministry and, therefore, meet less frequently or for longer periods of time.

**Catholic Schools, K-8**
Catechetical instruction in Catholic Schools is based on a minimum of
- Grades 1-3: 150 minutes per week
- Grades 4-8: 200 minutes per week

**Catholic Schools, 9-12**
A student is required to take a Religion course each semester while attending a Catholic high school. Catechetical instruction in Catholic Secondary Schools is based on a minimum of 250 minutes per week.

**Implementation**
1. Part of the time allotted for catechetical instruction may include liturgical celebrations, prayer services, and field trip experiences.
2. Bible study programs are encouraged as an additional means of bringing catechetical instruction to participants in the parish or Catholic school program.
3. The person or persons responsible for the catechetical instruction and/or youth ministry are to prepare an annual calendar containing the schedule of the program and related activities.
4. Michigan State Law provides up to 120 minutes per week of released-time for religious instruction. The use of released-time is encouraged in those circumstances where it is feasible.

**5058 Copyright Laws**
The Office of Catholic Schools will be cognizant of and communicate to administrators current copyright laws as they apply to copyrighted and licensed
materials of any kind. It is the responsibility of the school administrators to see that the copyright and licensing laws are adhered to in their building.

5060 Family Life Education
While the parents are the primary educators of their children, schools shall provide age-appropriate, Catholic family life education (including human sexuality and chastity) as a component of catechetical instruction. All instruction must be in accord with the official teachings of the Catholic Church. Parents have the right to accept or decline instruction of their child in any area of human sexuality.

5120 Religious Education
Religious instruction in the Catholic Faith is required for all students attending diocesan schools. All instruction in the Catholic Faith must be in accord with the official teachings of the Catholic Church and following United States Conference of Catholic Bishops Guidelines.

5150 Co-Curricular Participation
Each school determines criteria for initial and ongoing participation in co-curricular activities. All co-curricular school-sponsored activities are to be in accord with the specific mission of the school. Activities are for the benefit of the students and are to be suited to their age as well as social, emotional, and physical development.

5151 School Athletic Program
All diocesan schools participating in interscholastic athletics must comply with the regulations of their chosen governing athletic association (e.g. MHSAA, GRACEAC) See related Administrative Policy #2030 Code of Conduct.

5174 Field Trips/Community Service Projects
Field trips and community service projects should be learning experiences to places of cultural, educational or religious significance and should enhance the lessons of the classroom. The school administrator, in consultation with the faculty, will determine the appropriateness of each field trip or community service project. See also Administrative Policy #2086 Field Trips.
5176 Instructional Technology

Instructional technology is integrated to maximize student learning as well as prepare students for life in the 21st century. Digital citizenship and cyber safety are incorporated at all grade levels.

5200 Class Size

In order to meet the needs of all students and to provide a framework in which teachers and students can interact on an individual and class basis, the schools of the Diocese shall use the following recommended guidelines when considering maximum class sizes (number of students in one classroom with one professional teacher):

- Kindergarten 22
- Grades 1-2 26
- Grades 3-5 28
- Grades 6-8 30
- High School 35

The number of students in a class is only one of many important factors to be considered when determining the optimum class size. Other factors include, but are not limited to: the particular skills of the teacher, the space limitations of the classroom, the ability level of the students, the behavioral needs of the class, the desire not to exclude a parish family, and the minimum class size average of 18 if the class were to be divided. The principal/administrator should consider all of these factors in light of the recommended class size guidelines when determining the most appropriate number of students in a classroom in any given year. In some circumstances, it may be recommended to consider the additional part-time help of a teacher aide for critical portions of the day where additional assistance is required.

In situations where class size could potentially fall below the minimum of 18 or above the recommended maximum guidelines noted above, the administrator must consult with the pastor, the board of directors, and the superintendent before making a final determination.

5210 Standardized Assessment

All schools will participate in a standardized assessment program as determined by the Diocese. Assessment reports will be submitted to the Diocese.
5220 Innovation
The Diocese encourages innovative programs to meet local interests and needs within the context of the school’s mission. The Office of Catholic Schools should be notified of innovative program development. Support in design, implementation, and evaluation is available from the Office of Catholic Schools.

5225 Online Instructional Student Video or Photo Sharing
In compliance with the Family Educational Rights and Privacy Act (FERPA), teachers can record online learning sessions with students, but should share them sparingly giving firm instructions to parents and students that these are the property of the school and are not to be shared outside of the class. When possible, teachers should only share these through a private source such as a Learning Management System (LMS) where only the students and/or the parents have access. If there is any of the following content on the video DO NOT share that portion of the video:
- a teacher disciplining a student
- a student acting out or being socially inappropriate
- An assessment (test, quiz, check for understanding) where viewers could observe the results of individual students

The Catholic schools of the Diocese of Grand Rapids expressly prohibit republication or other use of virtual learning videos or photos. All virtual learning modules/sessions/photos are the property of the school, are not for republication or other use, and if a parent or student improperly utilizes the materials, s/he will be subject to the school’s disciplinary code and/or other sanctions.

5230 Student Support Services
All schools will participate in a Child Find process in collaboration with the local public school district or designated entity.

All schools that receive federal funding are required to comply with federal and state civil rights legislation. Schools that receive federal funding will provide a Student Service Plan or Accommodations Agreement providing reasonable and effective classroom interventions to accommodate the student’s identified learning needs.
5235 Catechesis and Religious Education for Persons with Disabilities

Each parish will provide catechetical formation for persons who have disabilities. Catechetical formation is experienced in as inclusive an environment as possible (Canon 777).

Implementation

1. Catechesis for persons with disabilities follows the recommendation that “Great care should be taken to avoid further isolation of people with disabilities through these programs (special religious education) which, as far as possible, should be integrated with the normal catechetical activities of the parish.” Pastoral Statement of U.S. Catholic Bishops on Persons with Disabilities, USCCB, Revised.

2. The Parish Catechetical Leader, in cooperation with the parents and appropriate consultants, is to assess the child’s/youth’s strengths and needs in order to establish the appropriate catechetical experiences.

3. Catechists working with persons who have disabilities will acquire, during their catechist formation, the understanding and skills necessary for their ministry.

4. Children/Youth with disabilities are to be included in the same program as their same age peers, after careful preparation of catechists, students and parents.

5. Catechetical formation is to include the following adaptations:
   a. The site is physically accessible.
   b. Text and other resources allow persons the greatest degree of participation.
   c. Catechetical content and methods are adapted to the individual’s learning style.

5240 Parental Participation in Faith Formation Programs

School leadership should involve parents in a way that acknowledges that the parents are the most significant influence on the faith formation of their children. School leadership should assist parents in the formation of their own faith, and provide for a partnership model that enables parents to assume the primary responsibility for the faith formation of their children.
5250 Campus Ministry

Each high school shall implement a Campus Ministry Program to help achieve its main goal, the Catholic formation of youth.
ADDENDUMS

A – 2182 Electronic Information and Acceptable Use of School Systems
CIPA Compliance Documentation

David Faber

From: David Faber
Sent: Friday, June 08, 2012 5:18 PM
Subject: Public Notice of June 12 Diocesan School Board Meeting for consideration of Internet Use Policy
Attachments: DOGR – OCS DRAFT AUP June 2012 for Website Notification.docx

Dear Members of the Diocesan Board, Pastors, and Principals,

Below is a link to the public notice that is required in order for our board to consider the attached Internet Use Policy at our June 12, 2012 meeting. While public notice of specific items on our agenda is rare, it is required to ensure that our schools maintain their compliance with new elements of the Children’s Internet Protection Act (CIPA) that takes effect on July 1, 2012. In order for our schools to continue to qualify for Federal E-Rate Discounts (discounted telecommunications rates), they must remain CIPA compliant. You can access the final draft of the policy either through the attachment to this email or by clicking on the link to the public notice and following the link to the proposed policy. If you have any questions, please don’t hesitate to call.

http://www.dioceseofgrandrapids.org/Pages/Home.aspx
(See bulletin on the left hand side of the home page)

Dave Faber
Superintendent of Catholic Schools
Phone: 616-233-5975 (Direct)
Diocesan Catholic School Board, meeting for consideration of Internet Use Policy - PARENT COMMENTS WELCOME!

360 Division Ave. S., Grand Rapids, MI 49503

Tuesday, June 12 - 6:30 PM to 8:00 PM

The Diocesan Catholic School Board will be considering the Internet Use Policy for diocesan Catholic Schools at its meeting on Tuesday evening, June 12, at Cathedral Square Center in Room D/E at 6:30 PM. Parents are welcome to come and share input. The public can review the proposed policy at: see Event Website link to view policy.

Event Website
Costs: none

Comments (0)
Please login to post comments.
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Comments (0):

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Diocesan Catholic School Board Meeting
Cathedral Square 2nd Floor Room D/E
6:30 PM
June 12, 2012

Agenda

I. Prayer (5 min.) Fr. Russo

II. Roll Call Sarah

III. Approval of April Minutes (5 min.) Sarah

IV. Approval of Agenda Sarah

V. Communications

VI. Discussion/Updates Dave
A. Vision- Strategic Initiatives/Annual Report Distribute Copies (5 min.)
B. Our Faith, Our Future Plan, Bishop’s Decree, and Recent Letters (10 min.)
C. Enrollment Report (5 min.)
D. Diocesan Catholic School Board Assessment (15 min.)
E. Review of Terms and Election of Officers (10 min.)

VII. Superintendent’s Report and Attachments (5 min.) Dave
A. Written Report – Questions?

VIII. Committee Reports
A. Marketing Committee (10 min.) Michael S./Sue
B. Policy - Student Dignity Policy (more emphasis on Anti-Bullying) Larry
C. Other Committee Activity to Report?

IX. Action Items - Proposed Policies Sarah/Dave
A. Electronic Information Acceptable Use for Educational Purposes Policy (10 min.)
   Including: New CIPA compliance features of Internet Safety and Filtering
B. Budget and Finance Policy Changes as a result of Bishop’s Decree (10 min.)
C. Guidelines for Fundraising Activity (5 min.)
D. MHSAA Membership Resolution (1 min.) (Need Sarah’s Signature)

X. Old Business
A. Social Media Policy (1 min.)
   (DRAFT is now going through diocesan review)

XI. Closing Prayer (1 min.) Fr. Russo

XII. Adjournment Sarah

XIII. Next Meeting: Full Board August 14, 6:30 PM – Room D/E Sarah
     PLEASE NOTE: See Attached 2012-13 School Board Meeting Schedule
Diocesan Catholic School Board
Meeting Minutes
June 12, 20xx

Members Present: Sarah Bolter, Larry Kassuba, Sue Haas-Williams, Michael Rosloniec, Rev. Anthony Russo, Michael Sochacki, Cindy Thomas

Members Absent: Rev. Charlie Brown, Melanie Grover, Kevin McDowell, Deacon Bill Charron, Paul Tenbrock

Others Present: David Faber, Tricia Worrell, Cindy Kendall

I. Meeting was called to order at 6:37pm and opening Prayer was offered by Fr. Tony Russo
II. Roll Call
III. The April minutes were approved
IV. This agenda was approved
V. Communications
VI. Discussion/Updates
   A. Vision- Strategic Initiatives/Annual Report Distribute Copies
      i. It was encouraged to look at the electronic version online. The Annual Report has been placed on some parish websites.
   B. Our Faith, Our Future Pastoral Plan, Bishop’s Decree and Recent Letters
      i. Schools became a very prominent feature in Our Faith, Our Future process. Bishop Hurley has placed a priority on Catholic education. It was encouraged that a letter be written from the board to Bishop Hurley thanking him for his strong support of Catholic education.
      ii. The Bishop’s Decree clearly spells out the parish support of Catholic schools.
      iii. Bishop Hurley wrote a letter to all pastors regarding enrollment.
   C. Enrollment Report
      i. It was asked that this report be sent to this board once a month. We are now retaining our students. This sends a positive message to the community. It is important to begin growing. Continued prayer for growth is encouraged.
      ii. Dave will meet with pastors and principals throughout the summer and enrollment will be a topic of discussion.
      iii. Questions were raised regarding the appropriateness of public schools coming into elementary schools to present information. It was suggested that encouragement should come from this board on thoughts regarding this policy.
   D. Diocesan Catholic School Board Assessment
      i. It was asked to complete this assessment by June 22. The results will be present at the August board meeting. The executive committee will use this data for planning for the upcoming year.
      ii. Sarah Bolter completed this survey and commented on questions that called to make judgments on other board members. It was determined that the Executive Committee should evaluate these questions. Replacing the word board with I would help to eliminate uncertainty.

E. Review of Terms and Election of Officers
   i. The nominating committee will meet in July. If Deacon Bill Charron does decide to sit on this board we will have twelve members. The nominating committee will create a schedule of terms and also prepare a list of potential new members. A full board consists of sixteen members.

VII. Superintendent’s Report and Attachments
   A. Written Report
   B. Item not included in Written Report:
      i. Dave did not include information regarding the WINGS schools. They are holding an eight week summer program which thirty students have enrolled in. As of July 1, Kendra DeYoung will become Principal/Director and Melanie Grover will be the Board Chair of the WINGS schools. This restructure will make these schools viable well into the future.
The model created makes these schools able to run a very small school efficiently and sustainable into the future.

VIII. Committee Reports:
A. Marketing Committee:
   i. The committee has decided to meet more regularly to build capacity and recruit and retain students. They are in the process of developing a marketing plan that will include a more grass roots infrastructure. This committee would like to work collaboratively with the individual schools marketing committees to create a strong infrastructure. In order to build this infrastructure each school needs to have a marketing committee. Building these relationships between individual marketing committees will allow effective strategies to be easily shared and implemented.

B. Policy Committee: Student Dignity Policy
   i. This policy currently addresses sexual and racial harassment in a comprehensive way, while just mentioning bullying. Given recent legislation and new learning, Dave Faber is recommending that a more comprehensive bullying section be added to the policy. Dave Faber has asked Larry Kassuba to review samples from the Diocese of Lansing and the Michigan State Board of Education and draft a bulling section for the policy. Dave would like to have an update to the Student Dignity Policy at the August Meeting. Larry stated that he can have a draft prepared for the August meeting. Larry requested that another individual sit on this committee.

C. Other:
   Development Committee
   i. Michael Rosloniec reported that Marlyn Zack will sit on this committee. Michael will meet with Ken Baldwin on Friday, June 15 to discuss development ideas. Mark Morrow and Michael Wolfston will also be meeting with Dave and Michael. Michael will also meet with someone who works with estate planning.

Executive Committee
   ii. Sarah encouraged nominations by June 22 for Chair and Vice Chair. She also encouraged everyone to think about those who are non-board members who would be assets to their committees. Sarah made reference to the new form for committees to use when taking minutes for their meetings and encouraged committees to use it. This will help track the progress and work that each committee is making.

IX. Action Items
A. Electronic Information Acceptable Use for Educational Purposes Policy
   Including: New CIPA compliance features of Internet Safety and Filtering
   i. This Policy must be in place by July 1, 20xx. Changes to the policy were discussed and reviewed. In order to be in compliance with CIPA and to remain E-Rate eligible, there was a public invitation on the front page of the diocesan website welcoming attendance and comment at the meeting.
   ii. This will be a diocesan policy and apply to all schools. This policy is a supplement to the schools current policy handbook. Parents still need to sign this policy.
   iii. There will be numerous educational resources surrounding this policy along with professional training for various pieces to this policy. Each school needs to make sure their rules and policies do not contradict this policy.
   iv. It was decided that the dioceses should provide educational and supportive material to help clarify information written in the policy.
   v. The declaration needs to be on one sheet so it can be signed and returned separately.
   vi. There was some concern regarding what age was appropriate for the student signature to be required. This will be decided at a later date.
   vii. Dave called for public comment. There was no public comment.
   viii. There was a motion by Rev. Anthony Russo to recommend this policy to the Bishop. All present were in favor.
   ix. In addition to recommending the policy to the Bishop this board recommends consulting diocesan council with regard to what age the student should be required to sign this
policy and if this policy should be signed every year. Also recommended from the board was that the diocese provide educational resources to help support this policy. Mike Sochacki made the second motion. All present were in favor.

B. Budget and Finance Policy Changes as a result of Bishop’s Decree  
   i. There was a motion to approve by Larry Kassuba. All were in favor.

C. Guidelines for Fundraising Activity  
   i. Two lines were added to this policy Michael Rosloniec made a motion to approve and all were in favor.

D. MHSAA Membership Resolution  
   i. Mike Sochacki made a motion to approve. All were in favor.

X. Old Business  
   A. Social Media Policy  

XI. Closing Prayer was offered by Rev. Anthony Russo  

XII. The meeting was adjourned at 8:48pm  

XIII. Next Meeting:  
   August 14, 6:30 PM – Full Board – Room D/E
Since the Scrip and Meijer Rewards programs were introduced several years ago, parishes and schools have earned thousands of dollars. The sale of Scrip certificates is recognized as a beneficial source of additional income. However, there are specific procedures that must be followed in order to ensure that proper internal controls are in place and that the operation of the program does not jeopardize the tax-exempt status of the parish and school.

If you are currently conducting a Scrip or Meijer Rewards program in your parish and/or school or if you intend to begin a program, it is important for you to thoroughly understand the possible risks and requirements of running such a program. Therefore, we have drafted a set of procedures that outline the steps necessary to properly run a Scrip Program and the possible risks if the procedures are not followed.

Please read and study these procedures carefully and discuss them with your program coordinators and any staff who are involved in the process. If you decide to continue to offer a Scrip Program or begin a program for the first time, you must complete the attached checklist and sign an agreement to follow the Diocesan procedures.

Planning and Oversight
Planning is critical to the success of a Scrip program, as well as any other funding ventures; therefore, an Oversight Committee should be established. An Oversight Committee is charged with designing the Scrip program, establishing the goals, and setting practices and procedures. The committee presents the program to the finance council or the school board, monitors the activities of the program, and offers encouragement and support to Scrip workers and participants. The committee determines the distribution of profits only after consultation with the parish or school leadership. This committee periodically reviews the program goals and is responsible for program operations. Following are five broad areas in which policies and guidelines must be consulted.

Internal Controls
As a parish/school program, Scrip activity is subject to the same accounting procedures as those that are used in the parish, i.e., use of the Uniform Chart of Accounts. This includes recording all transactions on the parish/school books. Scrip certificates/cards are cash. A system must be in place to assure that certificates are counted on a regular basis and certificates are protected from theft. Without an adequate internal control system in place, it may be difficult or impossible to prove a loss for an insurance claim. Key areas of Scrip internal control:

1. Use one separate checking account for Scrip activity. Each check requires two signatures. The pastor or parish director with the advice of the parish trustees, or the school board, appoints the two check signers.
2. The Scrip certificates/cards must be kept in a secured location on the parish/school premises; certificates are to be sold on the parish/school premises. If certificates/cards are not kept on the
premises, then additional controls, i.e., storage, insurance, access, etc., must be established to account for Scrip activity and protect the certificates/cards from theft. Check with the diocese or the insurance carrier to obtain the necessary additional coverage.

3. A reasonable dollar limit must be set for scrip inventory and monitored periodically.

4. Forms: use forms to expedite record keeping:
   a. **Customer Order Form**, the weekly form given to those ordering Scrip
   b. **Inventory Form**, a form listing all certificates in inventory used for sales, tracking and accounting
   c. **Sales Tracking Form**, this form allows for recording purchasers, items, and quantities
   d. **Envelope**, an order-taking/delivery system used primarily by schools
   e. **Vendor List**, provided by the Scrip distributor; presented/modified on/for order forms
   f. **Scrip Provider Order Form**, use provider’s form to order program certificates

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<tr>
<th><strong>Customer Order Form</strong></th>
<th><strong>Inventory Form</strong></th>
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<td>• Name of Vendor</td>
<td>• Date</td>
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<td>• Rebate Percentage</td>
<td>• Beginning Inventory Numbers for: Name of Vendor, Amount, and Number of Certificates</td>
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<td>• Certificate Denomination</td>
<td>• Post Sale Inventory Numbers for: Name of Vendor, Amount, and Number of Certificates</td>
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<tr>
<td>• Quantity of Each Item Purchased</td>
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<td>• Total Purchase</td>
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<th><strong>Sales Tracking Form</strong></th>
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<td>• Purchaser’s Name</td>
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<td>• Name of Vendor</td>
<td>• Amount Enclosed</td>
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<td>• Quantity of Denomination Purchased</td>
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<td>• Certificate Identification Numbers</td>
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<td>• Total Sale (Check # if applicable)</td>
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<td>• Name of Person Selling</td>
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<th><strong>Staffing</strong></th>
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<td>The ideal Scrip worker is both honest and accurate. Volunteers and paid employees handle large amounts of cash and Scrip certificates/cards. Typically, cash is transferred electronically to pay for Scrip certificates. The integrity of a Scrip program rests with the quality of people involved with it. Designing a workforce of 85% or more volunteer time will eliminate the need to file a tax return with the Internal Revenue Service and pay taxes.</td>
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The Scrip program staff can be employees and/or volunteers. Each volunteer and paid worker should have a job description. See suggestions below. There are several categories of tasks within a Scrip program. Some tasks may be assumed into combined roles. However, the person who receipts monies should not complete the deposit slip and deposit the funds. Likewise, the person who completes the record of receipts/expenditures should not reconcile the account.
Suggested roles and tasks:

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<tr>
<th>Scrip Program Coordinator</th>
<th>Scrip Seller</th>
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<tr>
<td>• Recruits program volunteers</td>
<td>• Be familiar with the sales procedures</td>
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<td>• Defines the workers' tasks</td>
<td>• Un/relock the inventory</td>
</tr>
<tr>
<td>• Oversees all workers</td>
<td>• Pull the certificates from inventory</td>
</tr>
<tr>
<td>• Updates forms</td>
<td>• Record the sale with required information on appropriate form(s)</td>
</tr>
<tr>
<td>• Attends all Scrip meetings</td>
<td>• Accept cash, COD</td>
</tr>
<tr>
<td>• Responsible for advertising/marketing</td>
<td>• Take Scrip orders</td>
</tr>
<tr>
<td>• Reports to parish/school board</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Order Person</th>
<th>Record keeper (Reconciler)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Pick up, assemble and check customer orders/money</td>
<td>• Use a separate Scrip account; two signatures are required</td>
</tr>
<tr>
<td>• Fill orders from inventory</td>
<td>• Tally certificates sold, cash received, inventory, deposits</td>
</tr>
<tr>
<td>• Place order with vendor(s)</td>
<td>• Prepare a statement of transactions</td>
</tr>
<tr>
<td>• Write check to pay vendor (DO NOT sign check)</td>
<td>• Prepare a comprehensive monthly report</td>
</tr>
<tr>
<td>• Deposit money</td>
<td>• Keep files</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Order Fillers</th>
<th>Scrip Pick-up Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Verify incoming Scrip with order</td>
<td>• Goes to regional and local vendors to pick up Scrip certificates</td>
</tr>
<tr>
<td>• Record certificate number sequence for inventory</td>
<td></td>
</tr>
</tbody>
</table>

Marketing and Promotion
The marketing and sales of Scrip are to keep with the mission and philosophy of the sponsoring parish/school. It is important to remember that Scrip purchases are **not** tax deductible as charitable contributions. To maximize participation of the parish/school in the Scrip program, effective marketing and promotion is essential. Items of concern are:

1. While it is important to make the sale of Scrip convenient for the customer, sale of Scrip certificates should be on parish/school property. If certificates are not kept on the premises, then additional controls must be established to account for Scrip activity and protect the certificates/cards from theft. Check with the diocese or the insurance carrier to obtain the necessary additional coverage.

2. According to information received from the Internal Revenue Service in May 2003, parents, grandparents, and other individuals who purchase Scrip from a school sponsored program for their own **personal use** may designate who is to receive any applicable **school tuition** credits/rebates without any income or gift tax consequences.

   The IRS also noted that when grandparents and other individuals purchase Scrip and then apply any credits/rebates towards **religious education program tuition**, gift tax consequences could result. However, currently gifts totaling $11,000 per donee per calendar year are exempt from gift tax so in most cases this will not apply.
However, if parents, grandparents and other individuals purchase Scrip from the sponsoring organization and then **resell** the Scrip to others, any profit directed to a student’s tuition bill and/or Scrip requirement is in effect a commission the purchaser is receiving for their efforts to resell the Scrip. The exact income and tax withholding requirements in this case will depend on all of the specific facts and circumstances.

Please note that the IRS did caution that income tax issues could arise if Scrip is used to purchase items that will be deducted as a business expense. The rebates received on Scrip (or applied to someone’s tuition) generally are not income, but the rebates reduce the basis of the item purchased. Therefore, the business expense deduction would equal the cost of the item less any rebate from the Scrip. In order to avoid confusion, a better practice would be to limit Scrip credits/rebates to cases when the Scrip will be used to purchase items for the individual’s personal use.

3. Maintaining data in a computer program is very helpful; NSC, Great Lakes Scrip, and some parishes offer programs at little or no cost.

**Ordering and Selling Scrip**

Establish a working relationship with Scrip vendors. Follow their guidelines for purchasing Scrip certificates. Establish a Scrip checking account and an ACH relationship (electronic transfer of funds) with your bank. Upon receipt of your Scrip, ALWAYS check certificates against the order. Items of concern are:

1. Establish procedures for receiving, processing and delivering Scrip; prevail upon all volunteers to use these procedures.
2. Count the Scrip certificate inventory frequently but at least weekly.
3. The person who reconciles the checking account or the inventory may NOT be a person who is also involved with selling/ordering/filling orders. The parish/school bookkeeper should reconcile these accounts.
4. Keep a copy of the record of the inventory in a place other than with the Scrip certificates.

**Accounting and Reporting**

Accounting and reporting systems assure that financial activities of a program are proper and that information is communicated to all that participate in the program. Below are key items that will help to create a system that meets the individual needs of each parish/school.

1. All Scrip transactions should be recorded on the parish/school general ledger using the Uniform Chart of Accounts. The parish/school is required to report Scrip activity to the diocese each year. Using the same accounting system for Scrip will greatly facilitate this requirement. Items that can be kept in separate records may include lists of purchasers, volume of sales per customer, inventories, etc.
2. Use only one Scrip checking account. Two signers are needed for each check. This requirement is similar to the diocesan rules on parish checking accounts.
3. The Oversight Committee should review Scrip activity monthly.
4. Regular reports should be made monthly to the finance council or board and annually to parishioners.

5. A computer and Scrip program can greatly help in organizing Scrip information.

6. **The IRS considers Scrip fundraising activities a trade or business.** The profits made from the activity are exempt from income tax when the number of volunteer hours is at least **85%** of the total number of hours it takes to run the program. In a letter dated December 3, 1998, the IRS stated on this matter, “It is the responsibility of each participating parish or school to maintain any records necessary to show that this is in fact the case.”

7. All Scrip programs must maintain a record of the hours compiled for each volunteer and paid employee. At the end of the fiscal year, June 30, a calculation must be made to see if the program meets the “85% test”. If the paid hours exceed 15% of the total hours, a federal form 990T must be prepared and tax paid on the profits. Filing this tax return is a significant burden, but can be avoided with proper planning.

**Acknowledgements**

These procedures we adapted with permission from the Diocese of Green Bay. The following individuals served on the Green Bay Diocesan Scrip Guidelines Committee. The principals and coordinators represent well-developed Scrip programs.

Betty Dorn, SS. Peter & Paul Parish, Kiel  
Tom Kurkowski, Director, Finance and Accounting, Diocese of Green Bay  
Debbie LaSage, Scrip Coordinator, Resurrection, Green Bay  
Kathy Mahlik, Scrip Coordinator, TRCCS, Two Rivers  
Tarry Majewski, Coordinator, Our Lady of Lourdes School, DePere  
Sue Maleport, Scrip Coordinator, Holy Family School, Green Bay  
Linda Meyer, Coordinator, St. Mary – St. Patrick School, Reedsville  
Dean Swoboda, Coordinator, St. Paul School, Wrightstown  
Judith Urbanski, Principal, Holy Family School, Marinette

**Kate Vannieuwenhoven, Coordinator, Our Lady of Lourdes School, DePere**
Diocese of Grand Rapids
Scrip Checklist and Certification Form

In order to start up or continue a Scrip program, all Diocesan Parishes and Schools must conform to the Scrip Policy, and as evidence of their compliance, they must complete this check list, sign and return it to the Superintendent of Catholic Schools.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Have you read, and do you understand the Scrip Procedures as established by the Diocese of Grand Rapids?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Has a Scrip Oversight Committee been established? The Oversight Committee should be made up of the following people: Scrip Coordinator, Business Manager, School Principal, Board of Education member, Finance Council member, the Pastor or his delegate, and one or two other Scrip volunteers or members at large.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Have written procedures been established for receiving, processing and delivering Scrip?</td>
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<td></td>
<td>Have all Scrip volunteers been given a copy of the Scrip procedures and instructed to read and follow the procedures?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Has a separate checking account been established for all Scrip activity?</td>
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<tr>
<td></td>
<td></td>
<td>Does each check require two signatures, as assigned by the pastor or parish director with the advice of the finance council, or the school board?</td>
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<tr>
<td></td>
<td></td>
<td>Are the Scrip certificates/cards kept in a secured location on the parish/school premises?</td>
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<tr>
<td></td>
<td></td>
<td>Is a copy of the record of the inventory kept in a place other than with the Scrip certificates?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Is the Scrip certificate inventory counted frequently, at least weekly, by someone who is not involved with selling, ordering, or filling orders?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Has a reasonable dollar limit been set for scrip inventory <em>(one-week’s worth of Scrip orders)</em> and monitored periodically?</td>
</tr>
</tbody>
</table>

Are the following forms being used?

- **Customer Order Form**, the weekly form given to those ordering Scrip
- **Inventory Form**, a form listing all certificates in inventory used for sales, tracking and accounting
- **Sales Tracking Form**, this form allows for recording purchasers, items, and quantities
- **Envelope**, an order-taking/delivery system used primarily by schools
- **Vendor List**, provided by the Scrip distributor; presented/modified on/for order forms
- **Scrip Provider Order Form**, use provider’s form to order program certificates

Are the following procedures being followed?

- Upon receipt of Scrip, are certificates ALWAYS checked against the order? Is the person who reconciles the checking account or the inventory NOT a person who is also involved with selling/ordering/filling orders? 
- Does the parish/school bookkeeper/business manager reconcile the checking account and the inventory account on a monthly basis? 
- Are all Scrip transactions recorded on the parish/school general ledger using the Uniform Chart of Accounts? 
- Does the Oversight Committee review Scrip activity monthly? 
- Are regular reports submitted monthly to the finance council or school board and annually to parishioners? 
- Is an on-going record being maintained to keep track of the number of hours that paid staff...
<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>and unpaid volunteers work on Scrip?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are at least 85% of the hours worked on Scrip performed by non-paid volunteers?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>At the end of the year is a calculation performed to determine if the percentage of time spent by unpaid volunteers is at least 85% of the total hours worked on Scrip, and is a form 990-T submitted to the IRS if the hours worked by paid staff are greater than 15% of the total hours worked?</td>
</tr>
</tbody>
</table>

I certify that our Parish/School is in compliance with the Scrip policy and procedures as outlined by the Diocese of Grand Rapids and documented above.

__________________________
Signature of School Principal

__________________________
Signature of Pastor

__________________________
Signature of Scrip Coordinator

__________________________
Signature of Business Manager
C – 3330 Parish Support of Catholic Schools Decree

WALTER A. HURLEY
DECREE
Regarding Parish Support of Catholic Schools

It was the direction of the Council of Baltimore that every parish should have a parish school. While this never became a reality, the intent was an attempt to make education at the elementary and secondary levels available to our Catholic faithful. Today, many of our parishes have fine religious education programs, however, they are not a substitute for our Catholic schools.

The Code of Canon Law specifies that the pastor is to have particular care for the Catholic education of children and youth. Pastors have the duty of arranging everything so that all the faithful have a Catholic education (c. 528.1) (c. 794.2).

With this in mind, all parishes are expected to encourage enrollment in Catholic schools, provide opportunities to promote Catholic education and provide financial support for eligible parishioners (as defined by the parish) who choose Catholic education for their children at the elementary (k-8) and secondary (9-12) levels. Pre-school and pre-kindergarten should be self-sustaining programs and parishes without schools are not expected to provide support for these programs.

Catholic schools should be funded by a combination of tuition, parish support and fundraising.

In an effort to bring some fairness and equity across the board regarding the support of our Catholic Schools, I want to set forth these policies for the support of Catholic education by parishes in the diocese for both those with schools and those without schools to assist parishes in fulfilling their obligation to support Catholic schools.

Parishes with schools operated or sponsored by a parish:

The norm for parish support for parishes that operate schools is that not more than 35% of the offertory collection may be used to support a parish elementary school (k-8). In this way funds are available for other necessary programs and parish activities as part of a vital parish. In addition no more than 50% of the school budget may come from the offertory collection. Pre-school and pre-kindergarten should be self-sustaining programs and parishes with or without schools are not expected to provide support for these programs.

Support for secondary school students is set at $1,000 effective the school year 2012-2013 with an increase of $50 per year for successive years.

Parishes are also encouraged to support individual school scholarship funds or the Diocesan Scholarship Fund as part of their parish outreach.

Parishes without schools:

a. Support for elementary students is set at $1,000 per student for the school year 2012-2013 and increase $50 per year for successive years. This support is granted to those parishioners who request it and have the support of their pastors. In return, with the acceptance of the subsidy by the receiving parish, the parishioner shall receive the "in parish tuition rate".
b. Parishes that operate and sponsor an elementary school are not obliged to support another elementary school but are expected to provide support at the secondary level (9-12).

c. Support for secondary school students is set at $1,000 for the school year 2012-2013 with an increase of $50 per year for successive years.

d. Parishes may also wish to make, as part of their parish outreach, a contribution to the scholarship fund of the individual parishes or to the Diocesan Scholarship Fund that would be over and above any subsidy.

Adopted and Approved: April 25, 2012

Most Reverend Walter A. Hurley (Rev. Monsignor William H. Duncan
Bishop of Grand Rapids \ Ecclesiastical Notary
Proper personnel record keeping is a requirement for employers because it provides accessibility to accurate information on employee performance and work history. Some employee records are required by federal or state governments and must be retained. Organizing them by employee name makes retrieval easy.

Remember, everything that goes into the personnel file should be identifiable as to who created it (signed preferably) and when it was created. Documents that cannot be verified in this manner may prove to be useless in the event of a later dispute.

ACCESS TO FILES
Access to information about employees should be strictly limited to staff with the need to use the information in their jobs. Ensure that personnel files are stored in a secure location and are not left unattended even during business hours. When outside requests are received to provide verification of certain employment information, confirm only the information the employee has authorized in writing for release.

State of Michigan law permits employees the right to examine their personal employment records. This may require access to more records than just the official personnel file. This allows individuals the opportunity to confirm information in the file and identify any specific information which is believed to be incorrect. An employer may charge a reasonable fee for copies of all file contents. The employer usually has the right to control the time and location of reasonable requests for examination. The ownership of the personnel file and its contents rests with the employer who maintains it. An employee does not have the right to have access to employment references, background checks or certain other information in the file. Consult with the Diocese's Human Resources office if you have questions about release of specific contents from the personnel file.

RECOMMENDED CONTENTS OF PERSONNEL FILES

Pre-Employment
- Prescreening application notes
- Employment interview report form
- Employment verification
- Background investigation information
- Personal credit history (maintain as confidential)
- Personal criminal conviction history
- Reference check information obtained (including letters of reference)
- Pre-employment testing results
- Drug screening and other medical records (maintain as confidential in a separate file from other personnel records)
- I-9 forms (but not verification documents)
- Other background verification

**Employment**
- Employee’s original employment application and resume
- Employment offer letter
- Employment agency agreement if hired through an agency
- Handbook acknowledgment form showing receipt of Handbook
- Checklist from new employee orientation showing subjects covered
- Copies of all official transcripts
- Copies of Professional Certifications (i.e. Completion of Ministry Formation Program, Certificate in Youth Ministry Studies)
- Education verification
- Emergency Contact Form

**Payroll**
- W-4 Form
- MI W-4
- City W-4
- Weekly time sheets
- Individual attendance record
- Authorization for release of private information
- Authorization for all other payroll actions

**Performance Evaluations**
- New employee progress reports
- Performance evaluation forms
- Performance improvement program records
- Report of coaching and counseling sessions
- Corrective action letters
- Employee written warning notices
- Evaluations and professional development
- Investigation summaries and supporting documents (where misconduct occurs)
- Notes of counseling or other interviews regarding performance

**Training and Development**
- Training history records
- Protecting God’s Children certificate
- Training program applications/requests
- Training expense reimbursement records
- VIRTUS training completion form

**Wage/Salary Administration**
- Job description form – up to date
- Compensation history record
- Compensation recommendations
- Notification of wage and/or salary increase/decrease

**Leaves of Absence** (See also Medical Files, below. This information if it relates to an employee’s medical condition, should be kept in a separate medical file with other medical information.)
- Leave requests
- Documentation to support leave
- Official notice of leave approval/denial
- Documentation of return from leave (include placement and reasons if changed)
- Documentation of notification of end of leave and expectations for return to work

**Separation**
- Exit interview form
- Record of documents given at time of separation.

**Other**
- Include any other item that documents important events for the employee (e.g., e-mail on important issues, compliments or commendations)

**WHAT SHOULD NOT BE IN A PERSONNEL FILE**
- Medical Records - separate confidential file required under ADA
- Physician records of examination - separate confidential file required under ADA
- Investigation Records - when no substantiation is found for misconduct (a separate file should be maintained to document that an investigation was completed and the conclusions from that investigation)
- Accusations of policy/legal violations - when no substantiation is found for misconduct
- Arrest records (except for pending felony charges)
- Unsupported or Undocumented Opinions

**I-9 FORMS**
Completion of the I-9 form is mandated for every employee hired after November 6, 1986. Employers are required to log document numbers which prove the employee’s identity and right to work in the United States. I-9 forms should be kept in a separate file for ease of retrieval since many government agencies are authorized to inspect I-9 forms.

**MEDICAL FILES**
The federal Health Insurance Portability and Accountability Act of 1996 (HIPAA) and the Americans with Disabilities Act (ADA) require employers and health care providers to
protect medical records as confidential, separate and apart from other business records. Therefore, medical information should not be retained in a personnel file. Examples of information about employees that should be placed in a protected medical file separate from the personnel file include but are not limited to:

- any document that contains private medical information about the employee or the employee’s family
- doctor notes
- claims for medical services
- disability documents
- forms for short term, long term or temporary leaves
- return to work documents
- FMLA medical certification documents
- ADA information regarding reasonable accommodations
- documents or correspondence related to reasonable accommodation and work restrictions
- correspondence related to medical leaves and absences to the extent they contain medical information
- transitional work agreements
- worker’s compensation records or correspondence
- injury or illness reports
- OSHA injury and illness reports
- any other form or document which contains private medical information for a specific employee

While physically separate from the official personnel file, the medical file may be stored in the same locked cabinet as an employee’s official personnel file. The medical file may even be placed next to the official personnel file as long as there is a clear division between them and they can be accessed independently of each other.

RECORDS RETENTION

The USCCB recommends the following guidelines regarding the retention of personnel files and information:

<table>
<thead>
<tr>
<th>Records Type</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td></td>
</tr>
<tr>
<td>Disability records</td>
<td>7 Years</td>
</tr>
<tr>
<td>Pension vesting files</td>
<td>7 Years</td>
</tr>
<tr>
<td>Retirement benefits</td>
<td>7 Years</td>
</tr>
<tr>
<td>Service records</td>
<td>7 Years</td>
</tr>
<tr>
<td>Permanent earnings and records</td>
<td>7 years after benefit termination</td>
</tr>
</tbody>
</table>
Attendance records 7 years after termination
Employee contracts 7 years after termination
Employee deduction authorization 7 years after termination
Employee salary schedules 7 years after termination
FMLA Reports 7 years after termination
Labor Contracts Permanent

**Health and safety**
Accident/injury reports 7 years
Employee medical complaints 7 years
Employee medical records 30 years from termination
Environmental test records/reports Permanent
Hazardous exposure records Permanent
Toxic substance explore reports Permanent
Workers' compensation records 12 years after injury (filing), death, or Last compensation payment

**Lay Personnel actions**
Applications rejected 1 year
Employee evaluations 2 years after termination
Personnel files, terminated 7 years
Termination records 7 years

**Salary administration**
W-2 forms 7 years from time of filing
W-4 forms 7 years from date of filing
Time cards 3 years from date of filing
Time sheets 3 years from date of filing
I-9 form 7 years after termination