

2019 *Charter* Audit Workshop

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PRESENTED BY: THOM ENGLERT



Agenda

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- Submission of documents
- Observations from the Field
- Quality Issues
- Parish Survey Tool
- Review of Audit Completion

Submission of Documents

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- Deadline for Submission of documents:
 - ✦ Charts A/B, C/D to Stonebridge no later than **Friday, August 30, 2019.**
 - ✦ Audit Instrument and Interview Schedule one week prior to On-site visit
 - ✦ Early submission is appreciated!
 - ✦ USCCBCharterAudits@stonebridgebp.com

Submission of Documents

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- Chart A/B – Reporting Allegations
 - ✦ Included allegations referred to/from another Diocese
 - ✦ Report past allegations not previously reported (such as from a file review)
 - ✦ Offer pastoral care to anyone reporting an allegation (can be offered through an attorney if necessary)

Observations from the Field



- Over 95% of locations request the optional Management Letter
- Over 75% of locations report some form of refresher Adult training
- Over 85% of locations report renewal of background checks
- Over 50% of locations report some type of parish site visit
- Stonebridge believes these activities lower the risk of a failure within a Safe Environment Program

Quality Issues

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- Are training materials up to date?
- Are Background check provider(s) reliable ?
- List of disqualifying offenses
- Communication between Chancery and Parishes

Parish Survey Tool

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- Web-based survey distributed via email by diocesan audit contact
- Results summarized automatically and shared with dioceses/eparchies as part of the audit process
- Contact Stonebridge for the link
- USCCBCharterAudits@Stonebridgebp.com

Audit Completion

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- **On-site audits**
 - Compliance Letter
 - Management Letter (optional) unless there is something noted that could affect compliance in the future. These comments will require additional follow-up at the close of the next audit period.
- **Data collection audits**
 - Compliance Letter
- **All letters will be addressed to the Bishop and distributed via USPS and email**

Questions

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