Adult Christian Education

MINISTRY

POLICIES & PROCEDURES MANUAL

A practical operating manual for Adult Christian Education ministry leadership, instructors, tutors, mentors, volunteers, and advisory council members

Ministry Purpose

This manual is designed to help an Adult Christian Education ministry operate with clarity, compassion, accountability, safety, and good stewardship. It should be adopted and customized by the legal sponsoring church or organization before use.

Prepared for local Adult Christian Education ministry use

August 2026

DRAFT FOR LOCAL ADOPTION

This manual is a ministry-use template and does not constitute legal, tax, employment, medical, insurance, or professional advice.

Document Adoption & Control

Before this manual is placed into use, the sponsoring church, association, nonprofit, or other legal organization should review it against its own governing documents, insurance requirements, personnel policies, child-safety rules, financial controls, and applicable law. Where the sponsor has a policy that is stricter or more specific, the sponsor's adopted policy controls unless leadership formally adopts another lawful standard.

Important

Adult Christian Education is a ministry function, not automatically a separate legal entity because it uses a ministry name. The sponsoring organization should clearly identify who owns the records, holds insurance, employs staff, receives donations, signs contracts, and has final governing authority.

Local Adoption Information

Adult Education Ministry / Program Name	______________________
Sponsoring Organization	______________________
City / County	______________________
Authorized Leader	______________________
Date Adopted	______________________
Next Scheduled Review	______________________

How Changes Are Made

The Adult Education Coordinator may recommend revisions, but changes that affect legal obligations, participant rights, financial controls, insurance, employment, safeguarding, or governing authority should be approved through the sponsoring organization's established process. Each adopted revision should be recorded in the Revision History appendix.

How to Use This Manual

This manual is designed for day-to-day use. Each section answers six practical questions: Why does this policy exist? What does the ministry require? What should staff do? What should be documented? Which forms apply? Who is responsible for review?

- Use the manual together with the ministry's Adult Christian Education forms. The manual establishes the policy; the forms document that the policy was followed.
- Do not create a form simply because information might be interesting. Collect only information needed for ministry service, safety, accountability, reporting, or lawful administration.
- When a participant's situation is complex, do not turn the ministry into a counseling, legal, medical, or social-service agency unless the sponsoring organization is actually qualified and authorized to provide that service. Use appropriate referrals.
- When a situation involves immediate danger, suspected abuse, a serious medical emergency, threats of violence, or another urgent safety concern, safety and legally required reporting take priority over ordinary internal procedures.
- When a policy conflicts with applicable law, an insurer requirement, a court order, or a governing policy of the sponsor, leadership should stop and obtain appropriate guidance rather than improvise.

Core Adult Christian Education Operating Principles

- Compassion with accountability: participants are treated with dignity while expectations remain clear.
- Strength-based practice: records and conversations focus on abilities, progress, choices, resources, and next steps rather than labels or assumptions.
- Christian identity without coercion: Bible study may be a required part of participation after commitment, but a profession of faith, baptism, church membership, or other specific spiritual decision is not a condition of respectful service or completion.
- Privacy by design: collect less, protect what is collected, share only what is authorized or legally required, and avoid unnecessary sensitive details.
- Human judgment: AI and automated tools may assist learning and administration but do not replace responsible human decision-making.
- Local accountability: the sponsoring organization remains responsible for legal, financial, insurance, employment, and governance decisions.

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SECTION 1 • MINISTRY IDENTITY, SCOPE & SPONSORING ORGANIZATION

Policy No.	1.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	**Review**	At least annually

Purpose

To define the Adult Christian Education ministry’s identity, educational scope, relationship to the sponsoring organization, and limits of authority so staff, instructors, tutors, and volunteers understand who is responsible for ministry decisions.

Policy

The ministry will operate as a Christian adult education ministry under the authority of its identified sponsoring organization. The ministry will serve within the mission, theological commitments, insurance coverage, financial controls, and governing authority adopted by that sponsor. ministry leaders will not represent the local site as an independent legal organization unless it has actually been formed and recognized as such.

Procedures

1. Maintain a current ministry profile identifying the legal sponsoring organization, primary service area, Adult Education Coordinator, meeting location, and official contact information.
2. Document who has final governing authority, who supervises the Adult Education Coordinator, who approves expenditures, who may sign contracts, and where official records are maintained.
3. Describe the population the ministry is called to serve and the services The ministry is prepared to provide. Distinguish ministry services from professional services that require a license or specialized credential.

4. Use ministry language that accurately represents what the ministry can do. Do not promise employment, housing, financial assistance, legal representation, clinical counseling, medical care, or guaranteed outcomes unless the sponsoring organization has specifically authorized and is qualified to provide those services.
5. Review the ministry's scope annually and whenever leadership, location, insurance, services, childcare, transportation, or funding arrangements materially change.

Practice Notes

- Use the ministry's adopted Adult Christian Education name consistently in local materials unless the sponsoring organization requires a specific formal name.
- Do not allow an advisory council, donor, volunteer, or partner agency to assume authority that has not been granted in writing.

Documentation

The Adult Education Coordinator maintains the current ministry profile, governance information, adoption records, and any written approvals that define the local site's scope.

Related Forms

- Set 10 — Adult Christian Education Ministry Profile
- Set 10 — Sponsoring Organization & Governance Information
- Set 10 — Ministry Leadership Team Roster & Responsibility Map
- Set 10 — Final New-Site Launch Readiness Review

Responsibility

The sponsoring organization has final responsibility for legal and governing authority. The Adult Education Coordinator is responsible for day-to-day implementation within that authority.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 2 • GOVERNANCE, LEADERSHIP & ADVISORY COUNCIL

Policy No.	2.0	Effective	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To establish clear leadership roles, appropriate advisory council functions, conflict-of-interest safeguards, and accountable decision-making.

Policy

The ministry will maintain a defined leadership structure with one accountable Adult Education Coordinator or other designated leader. An advisory council provides counsel, community connection, resource development, prayer, and accountability but does not automatically become the governing board of the sponsoring organization.

Procedures

1. Maintain a current leadership responsibility map for site coordination, participant records, Bible study, mentoring, volunteers, financial processes, safety, community networking, and other major functions.
2. Provide advisory council members with orientation to the ministry's purpose, confidentiality, conflicts of interest, participant privacy, safeguarding, and the limits of advisory authority.
3. Document terms of service, attendance, recusals, recommendations, and significant action items. Meeting minutes should record decisions and follow-up without reproducing confidential participant details.
4. Require disclosure of actual or potential conflicts of interest. A person with a material conflict should disclose it and refrain from participating in a decision when appropriate.

5. Maintain a leadership continuity plan so essential functions do not depend on one person having all passwords, records, contacts, or institutional knowledge.

Practice Notes

- Use aggregate or de-identified participant information in council meetings whenever individual identity is not needed.
- Document recommendations clearly enough that future leaders can understand what was decided and why.

Documentation

Keep current leadership rosters, council covenants, confidentiality agreements, conflict disclosures, minutes, recommendation records, and succession/backup plans.

Related Forms

- Set 10 — Ministry Leadership Team Roster & Responsibility Map
- Set 15 — Advisory Council Purpose & Structure Adoption
- Set 15 — Advisory Council Member Covenant
- Set 15 — Conflict of Interest Disclosure
- Set 15 — Meeting Agenda and Minutes Templates
- Set 17 — Leadership Continuity & Succession Plan

Responsibility

The Adult Education Coordinator coordinates leadership and council processes; the sponsoring organization retains governing authority and approves matters reserved to it.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 3 • PARTICIPANT INQUIRY, APPLICATION, INTAKE & ENROLLMENT

Policy No.	3.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	**Review**	At least annually

Purpose

To provide a respectful, consistent pathway from initial inquiry through application, intake, enrollment, waitlist, deferral, or referral to another resource.

Policy

The ministry will use a staged intake process that begins with general information and collects additional personal information only when it is needed for enrollment, safety, goal planning, or services. Enrollment decisions will be made by authorized people using stated ministry criteria rather than personal favoritism, pressure, or information unrelated to ministry participation.

Procedures

1. Begin with the Initial Application and collect only general contact information, broad goals, age eligibility when relevant, and the participant's primary reason for seeking ministry services.
2. For people moving forward, complete the fuller Participant Application & Intake and strengths/goals planning forms. Explain why information is requested and allow optional questions to remain optional.
3. Review scheduling, transportation, childcare, accessibility, communication, education, employment, and other practical factors that may affect participation. Use these factors to plan support, not to label a person as unmotivated.
4. Explain the ministry's Christian identity, Bible-study expectations, mentoring structure, attendance expectations, privacy practices, media choices, grievance process, and safety rules before final commitment.

5. If the site is full or a person's needs are outside the ministry's capacity, explain the decision respectfully and provide an appropriate referral when possible. Maintain only the minimum record needed to document the inquiry or decision.
6. Do not require a Social Security number, bank account information, medical history, social-media password, or other highly sensitive information as part of ordinary enrollment unless a specific lawful and necessary process requires it.

Practice Notes

- Do not ask an applicant to tell her entire story in order to prove that she deserves help.
- When literacy is limited, offer to read forms aloud or complete them collaboratively without embarrassment.
- Document a waitlist with minimal information and a clear contact plan.

Documentation

Participant application and intake records belong in the confidential participant file. Summary enrollment status may be maintained on the internal master status record.

Related Forms

- Set 1 — Initial Application
- Set 1 — Participant Application & Intake
- Set 1 — Strengths, Goals & Support Planning
- Set 1 — Intake Interview Summary
- Set 1 — Enrollment & Next Steps
- Set 9 — Participant File Setup & Required Documents Checklist

Responsibility

The Adult Education Coordinator or trained intake staff administers enrollment. Final decisions should follow the sponsoring organization's approved eligibility and capacity guidelines.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 4 • PARTICIPANT RIGHTS, RESPONSIBILITIES, CONDUCT & GRIEVANCES

Policy No.	4.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To ensure participants are treated with dignity, understand what the ministry expects, and have a clear way to raise concerns without fear of retaliation.

Policy

The ministry will communicate participant rights and responsibilities in understandable language. Participants are expected to respect safety, confidentiality, attendance, communication, and conduct expectations. Concerns will be heard fairly, documented appropriately, and escalated when the Adult Education Coordinator is involved in the complaint or cannot resolve it impartially.

Procedures

1. Review participant rights, responsibilities, covenant, conduct expectations, attendance expectations, and grievance procedures during orientation or enrollment.
2. Use progressive, proportionate responses to ordinary conduct or attendance problems when safe and appropriate: clarify expectations, identify barriers, agree on next steps, document repeated concerns, and consider pause or dismissal only when needed.
3. Address threats, violence, serious harassment, theft, significant safety violations, or other urgent conduct immediately under the safety policy. Do not delay emergency action merely to complete ordinary corrective steps.
4. Provide a method for participants to submit concerns verbally or in writing. If a participant has difficulty reading or writing, staff should assist in documenting the concern in the participant's own words.

5. Prohibit retaliation against a participant who raises a good-faith concern, makes a required safety report, or declines optional media/publicity permission.
6. When participation is paused or ended, explain the reason, document the decision, identify any appeal process, and make reasonable referrals when appropriate.

Practice Notes

- Separate a barrier from a behavior. Transportation failure, childcare loss, illness, or work scheduling may require problem-solving rather than discipline.
- Keep written documentation factual and behavior-based. Avoid labels such as "lazy," "manipulative," or "noncompliant."

Documentation

Maintain participant covenants and grievance records in the confidential participant file. Serious complaints involving staff misconduct, safety, or governance should also be routed to the sponsoring organization according to its policies.

Related Forms

- Set 4 — Participant Rights & Responsibilities
- Set 4 — Participant Covenant & Commitment Agreement
- Set 4 — Participant Code of Conduct & Safety Expectations
- Set 4 — Attendance, Communication & Participation Agreement
- Set 4 — Participant Concern / Grievance / Appeal Form
- Set 8 — Participant Status Change / Re-Entry Record

Responsibility

The Adult Education Coordinator administers ordinary participant concerns. The sponsoring organization or designated alternate leader handles matters that involve the Adult Education Coordinator or require higher-level review.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 5 • CHRISTIAN MINISTRY, BIBLE STUDY, PRAYER & SPIRITUAL CARE

Policy No.	5.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To preserve the ministry's Christian identity while ensuring spiritual care is respectful, transparent, appropriately bounded, and never coercive.

Policy

The ministry is a Christian adult education ministry. Bible study may be a required component after a person chooses to enroll or commit to participation. No participant is required to make a profession of faith, be baptized, join a church, give a testimony, or make another specific spiritual decision in order to be treated with dignity or recognized for completing ministry requirements.

Procedures

1. Explain the Christian nature of the ministry and Bible-study expectations before final enrollment so participants can make an informed decision about participation.
2. Use Bible studies and spiritual resources that are consistent with the sponsoring organization's statement of faith and theological commitments and that point participants toward Christ without manipulating or pressuring a response.
3. Ask permission before sharing a personal prayer request beyond the staff or prayer team members specifically authorized to receive it. Prayer lists should use the minimum identifying information necessary.
4. When a participant requests pastoral care, church connection, grief support, or another spiritual resource, obtain appropriate consent before sharing personal information with an outside church or ministry.

5. Mentors and volunteers may discuss faith naturally and pray with participants when appropriate, but they may not use assistance, gifts, transportation, referrals, or access to ministry services as leverage for a spiritual decision.
6. Document spiritual conversations only when a record is needed for requested follow-up, safeguarding, or ministry coordination. Do not turn the participant file into a detailed record of private spiritual disclosures.

Practice Notes

- A participant may ask hard spiritual questions. Listening is often more appropriate than forcing a quick answer.
- Never publish a conversion story, prayer request, or testimony merely because it is inspiring; use the separate media/story permissions.

Documentation

Keep prayer-sharing permissions, pastoral/church referral consent, and requested spiritual follow-up records confidential. Attendance in Bible study may be documented without evaluating the authenticity of a participant's faith.

Related Forms

- Set 4 — Christian Ministry & Bible Study Acknowledgment
- Set 14 — Participant Spiritual Care Preferences
- Set 14 — Prayer Request & Permission
- Set 14 — Church Connection & Pastoral Referral Consent
- Set 14 — Spiritual Conversation & Follow-Up Record
- Set 14 — Spiritual Care Boundaries Acknowledgments

Responsibility

The Adult Education Coordinator and designated Bible-study/spiritual-care leaders are responsible for implementation. The sponsoring organization should approve the theological and ministry framework used by the site.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 6 • PRIVACY, CONFIDENTIALITY & INFORMATION SHARING

Policy No.	6.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To protect participant dignity and reduce privacy risk by limiting collection, access, use, sharing, and retention of personal information.

Policy

The ministry will collect only information needed for legitimate ministry purposes and will restrict access to people who need the information to perform their duties. Confidentiality is not absolute: information may be disclosed with valid authorization, as required by law, in response to a lawful order, or when necessary for immediate safety or mandatory reporting.

Procedures

1. Give participants the Privacy & Confidentiality Notice and explain the practical limits of confidentiality before collecting detailed personal information.
2. Store participant records in secure physical or electronic locations. Keys, passwords, and access rights should be limited and reviewed when roles change.
3. Use written authorization when releasing confidential information to another agency unless another lawful basis clearly permits or requires disclosure. The authorization should identify what may be shared, with whom, for what purpose, and for what period.
4. Honor a participant's revocation of authorization prospectively, recognizing that information already lawfully disclosed cannot be retrieved and that some records may still need to be retained.

5. Use de-identified or aggregate information for advisory council, fundraising, training, and evaluation whenever individual identity is not needed.
6. Do not discuss participant information in public spaces, prayer groups, social media, personal group chats, or with family/friends merely because they are interested in the ministry.
7. Do not label ordinary ministry records as "HIPAA" records unless the sponsoring organization has determined that a specific HIPAA obligation actually applies to that record or relationship.

Practice Notes

- "Need to know" is narrower than "nice to know."
- Avoid sending highly sensitive records by ordinary text message or personal email when a safer method is available.
- When in doubt about a subpoena, court order, law-enforcement request, or unusual disclosure request, refer it to the sponsoring organization before responding unless an immediate legal deadline requires action.

Documentation

Maintain privacy acknowledgments, confidentiality agreements, release authorizations, revocations, access logs, and records inventories according to the site's adopted records system.

Related Forms

- Set 2 — Participant Privacy & Confidentiality Notice
- Set 2 — Authorization to Release / Exchange Information
- Set 2 — Revocation of Authorization
- Set 2 — Staff / Volunteer Confidentiality Agreement
- Set 9 — Records Access / File Checkout Log
- Set 9 — Secure Records Inventory & Storage Checklist

Responsibility

The Adult Education Coordinator is the local privacy lead unless the sponsoring organization designates another person. All staff, mentors, volunteers, council members, and contractors are responsible for protecting information they receive.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 7 • TECHNOLOGY, DIGITAL SECURITY & RESPONSIBLE AI USE

Policy No.	7.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To allow the ministry to use technology and AI for practical learning and administration while protecting participants, staff, and the ministry from privacy, accuracy, security, and decision-making risks.

Policy

The ministry may use approved technology and AI tools to support education, job readiness, drafting, brainstorming, translation, digital literacy, and low-risk administrative work. Identifiable confidential records and sensitive personal information will not be entered into public AI systems unless the sponsoring organization has specifically approved a secure system and lawful use. Consequential decisions about people remain human decisions.

Procedures

1. Maintain an approved list or category of technology systems used for participant records, communication, file storage, virtual meetings, and AI-assisted work. Remove access promptly when a person leaves a role.

2. Never ask participants to give ministry staff their passwords, PINs, bank credentials, multifactor authentication codes, or personal account recovery answers. When helping a participant create or use an account, teach the participant to enter and control the credentials personally.
3. Do not place Social Security numbers, financial account numbers, copies of identification, confidential applications, case notes, incident reports, medical details, abuse reports, personnel records, or child records into public generative AI tools.
4. AI may help participants practice interviews, revise a résumé, understand a form, generate study examples, or draft a general email. Staff should teach participants to verify important facts and personalize outputs rather than submitting inaccurate or misleading information.
5. AI may assist staff with generic templates, training ideas, de-identified planning, or proofreading. Staff must remove identifying details and independently review accuracy, tone, bias, and appropriateness before use.
6. Do not allow AI alone to determine admission, discipline, dismissal, employment, volunteer eligibility, financial assistance, referrals, safeguarding responses, or other consequential decisions affecting a person.
7. Review vendor privacy terms, data-retention practices, access controls, and security expectations before using a technology system for sensitive ministry information.

Practice Notes

- The safest default is to use fictitious examples when demonstrating AI.
- A participant should understand what an AI tool is doing before relying on its output for a job application, budget, legal issue, benefits form, or other high-impact decision.
- Do not assume “private mode” or “incognito mode” means an AI service will not retain or use data.

Documentation

Document approved systems, staff training, major technology incidents, access changes, and any approved exception involving confidential data.

Related Forms

- Set 2 — Digital Privacy & Responsible AI Acknowledgment
- Set 3 — Virtual Meetings & Online Participation Agreement
- Set 9 — Technology / Records Readiness and Security Forms
- Set 13 — Email & Online Account Safety

- Set 13 — Responsible AI Use for Education & Job Readiness
- Set 17 — Technology & Responsible AI Practices Review

Responsibility

The Adult Education Coordinator and sponsoring organization determine approved systems. Every user is responsible for following privacy and security practices.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 8 • MEDIA, SOCIAL MEDIA & COMMUNICATIONS

Policy No.	8.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To protect participant choice and privacy while allowing appropriate ministry communication and public storytelling.

Policy

The ministry will obtain separate, informed permission for photographs, video, social-media publication, and personal stories/testimonials. Declining optional publicity will not by itself affect a participant's eligibility for ministry services. Staff and volunteers will use appropriate communication channels and maintain professional digital boundaries.

Procedures

1. Use the general media release for photographs or video and the separate social-media consent when content may be posted online. Do not assume one permission automatically covers every use.
2. Use the separate story/testimonial release before publishing a participant's personal history, transformation story, quote, testimony, or identifying narrative. When practical, allow the participant to review the final wording before publication.
3. Honor choices such as "photo allowed but no full name" or "internal use only." Maintain a permission tracker so staff do not have to rely on memory.
4. Use official official ministry contact methods when practical. Mentors and staff should not be required to connect with participants through personal social-media accounts.
5. Do not post screenshots of virtual meetings, text conversations, prayer requests, participant records, class rosters, or private groups without specific authorization.
6. For minors, obtain parent/guardian authorization and follow the child-safety policy. Avoid posting identifying information that creates unnecessary risk.

7. When permission is revoked, stop future uses that are reasonably within the ministry's control. Explain that previously printed materials or content already redistributed by others may not be fully retrievable.

Practice Notes

- A compelling story is still a person's story. Ask permission; do not treat ministry participation as blanket publicity consent.
- Avoid publishing details about incarceration, abuse, addiction history, immigration status, financial hardship, or family conflict unless the participant specifically and knowingly authorizes the story and leadership determines publication is appropriate.

Documentation

Keep signed media permissions and revocations in the participant file and maintain the internal permission tracker. Public content should be archived according to the sponsor's communications practices.

Related Forms

- Set 3 — Participant Photo, Video & General Media Release
- Set 3 — Social Media & Online Publication Consent
- Set 3 — Participant Story / Testimonial Release
- Set 3 — Communication Preferences & Consent
- Set 3 — Staff / Volunteer Digital Communication & Social Media Boundaries Agreement
- Set 9 — Privacy, Release & Media Permission Tracking Record

Responsibility

The Adult Education Coordinator or designated communications leader verifies permission before publication. Every staff member and volunteer is responsible for protecting participant privacy in personal communications and social media.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 9 • MENTORING, TUTORING & PARTICIPANT SUPPORT

Policy No.	9.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To provide safe, purposeful, strength-based mentoring relationships that support participant goals without creating dependency, blurred boundaries, or unmanaged risk.

Policy

Mentoring, tutoring, and participant support may be important parts of an Adult Christian Education ministry. Approved mentors and tutors will be screened, trained, matched or assigned intentionally, supervised, and expected to follow confidentiality, communication, safety, financial, transportation, spiritual-care, and social-media boundaries. These relationships are supportive and developmental; they are not substitutes for licensed counseling, legal representation, medical treatment, or financial management.

Procedures

1. Use only mentors who have completed the site's application, references, screening, orientation, confidentiality, boundaries, mandatory-reporting acknowledgment, and other required preparation.
2. Match participants and mentors using practical considerations such as availability, communication style, goals, preferences, location, and appropriate boundaries. Avoid sharing unnecessary private information during the matching process.
3. At the beginning of the relationship, review the mentoring agreement, contact expectations, meeting locations, communication channels, confidentiality limits, gifts/money rules, transportation rules, and process for requesting a rematch.

4. Mentors should listen, encourage, help participants identify strengths and next steps, practice skills, pray appropriately, and connect participants back to ministry resources. Mentors should not take over a participant's decisions, finances, parenting, legal matters, benefits accounts, or passwords.
5. Cash loans, co-signing, large gifts, ongoing financial support, shared bank accounts, business partnerships, living arrangements, romantic relationships, and other high-risk dual relationships are prohibited unless the sponsoring organization has a specific written policy and approval process that lawfully permits an exception.
6. Document mentoring contact at a summary level. Report safety concerns, suspected abuse, boundary violations, threats, or other serious concerns promptly through the appropriate policy rather than trying to manage them alone.
7. A participant or mentor may request a rematch. Leadership may also pause or end a match when it is not healthy, safe, productive, or appropriate.

Practice Notes

- Healthy mentoring helps a participant become more confident and capable; it does not make the mentor indispensable.
- When a participant needs professional counseling, legal help, addiction treatment, domestic-violence services, medical care, or another specialized service, use a referral rather than asking the mentor to become the professional.

Documentation

Maintain mentor approval records in the volunteer file, the match/assignment record in the participant administrative record, and brief mentoring contact/progress records as appropriate. Avoid recording unnecessary details from private conversations.

Related Forms

- Set 4 — Mentoring Relationship & Boundaries Agreement
- Set 6 — Mentor / Volunteer Application and Screening Forms
- Set 6 — Mentor / Volunteer Boundaries Agreement
- Set 8 — Mentoring Contact & Progress Record
- Set 9 — Mentor Assignment / Change Record

Responsibility

The Mentor Coordinator or Adult Education Coordinator supervises mentoring, manages matches, receives concerns, and ensures mentors receive continuing support and training.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 10 • STAFF, INSTRUCTORS, TUTORS & VOLUNTEERS

Policy No.	10.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To recruit, screen, orient, supervise, and support instructors, tutors, mentors, staff, and volunteers while maintaining appropriate personnel and volunteer records.

Policy

The ministry will place instructors, tutors, mentors, staff, and volunteers in roles only after the level of screening and preparation appropriate to the position has been completed. Paid employment remains under the sponsoring organization's official employment policies and payroll systems. Supplemental ministry forms do not replace required government forms, workers' compensation requirements, wage-and-hour records, or other employer obligations.

Procedures

1. Use written role descriptions so applicants understand responsibilities, supervision, schedule, required competencies, Christian ministry expectations, confidentiality, and safety responsibilities.
2. For volunteers and mentors, collect applications, references, screening authorization, and role-specific training before unsupervised service. Screening levels may vary based on access to children, vulnerable adults, finances, transportation, confidential records, or one-to-one relationships.
3. Use secure third-party processes for highly sensitive background-screening identifiers when available rather than storing Social Security numbers in ordinary volunteer files.
4. For paid staff, the sponsoring organization should use current official employment eligibility, tax, payroll, new-hire, and other required forms rather than reproducing government forms in ministry files.

5. Provide orientation to the ministry's mission, adult-learning approach, boundaries, confidentiality, safeguarding, grievance/concern reporting, technology/AI, social media, emergency procedures, and the person's role before service begins.
6. Provide regular supervision, performance feedback, professional development, and a documented process for workplace concerns. Corrective action should be factual, proportionate, and consistent with sponsor policy.
7. When a person leaves a role, recover keys and devices, remove system access, transfer records, document unresolved responsibilities, and remind the person that confidentiality continues after service ends.

Practice Notes

- Do not promise confidentiality to a staff member when a complaint involves safeguarding, unlawful conduct, harassment, financial irregularity, or another matter leadership must investigate or report.
- Keep performance documentation focused on expectations, facts, coaching, support, decisions, and next steps.

Documentation

Maintain volunteer/mentor records separately from participant files and paid personnel files according to the sponsor's system. Protect background-screening and personnel records with heightened access controls.

Related Forms

- Set 6 — Mentor / Volunteer Forms
- Set 16 — Position Profile / Job Description Template
- Set 16 — Staff / Leadership Application
- Set 16 — Personnel File Setup Checklist
- Set 16 — Supervision, Performance Review, Professional Development, Corrective Action and Exit Forms

Responsibility

The Adult Education Coordinator supervises ministry roles unless another supervisor is designated. The sponsoring organization remains the employer of record and final authority for paid personnel matters.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 11 • SAFETY, EMERGENCY RESPONSE, TRANSPORTATION & INCIDENT MANAGEMENT

Policy No.	11.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To establish practical procedures for emergencies, transportation, weather closures, accidents, incidents, and near misses.

Policy

The ministry will maintain a written emergency action plan for each regular meeting site and will respond first to immediate safety needs. Transportation will be provided only under approved conditions with authorized drivers and appropriate insurance. Incidents and near misses will be documented promptly and reviewed for follow-up.

Procedures

1. Post or make available the site address, emergency contacts, exits, severe-weather location, first-aid resources, and procedures for calling 911. New staff and volunteers should know how to respond before an emergency occurs.
2. For a medical emergency, call 911 when immediate professional care appears necessary. Provide responders with relevant emergency information the ministry lawfully maintains; do not delay emergency care while attempting to contact family.
3. For severe weather, fire, utility failure, building threat, or other site emergency, follow the site emergency plan and instructions from emergency authorities. Account for participants and children without putting staff at unreasonable risk.
4. Allow only approved drivers to transport participants on behalf of the ministry. Verify driver authorization, license, driving eligibility, and insurance as required by the sponsoring organization and applicable law. The sponsoring organization or insurer may require coverage or standards above state minimums.

5. Use seat belts and lawful child-restraint practices. Do not transport more people than the vehicle is designed to carry. Avoid transporting participants when the driver is impaired, dangerously fatigued, or using a vehicle that appears unsafe.
6. Complete an Incident / Accident Report after injuries, significant property damage, medical emergencies, threats, or other reportable events. Use a Safety Concern / Near-Miss Report when no injury occurred but the situation reveals a risk that should be corrected.
7. Notify the sponsoring organization and insurance carrier according to their requirements. Preserve relevant records and do not admit legal liability on behalf of the organization.

Practice Notes

- Call 911 for immediate danger. Internal notification is secondary to emergency response.
- After a serious incident, protect the privacy of involved people. Do not post information or photographs on social media.

Documentation

Maintain emergency plans, driver authorizations, trip logs, incident reports, near-miss reports, insurance notices, and follow-up documentation in the appropriate secure administrative files.

Related Forms

- Set 5 — Participant Emergency & Safety Information
- Set 5 — Emergency Medical Authorization
- Set 5 — Staff / Volunteer Driver Authorization
- Set 5 — Transportation Trip Log
- Set 5 — Incident / Accident Report
- Set 5 — Safety Concern / Near-Miss Report
- Set 5 — Site Emergency Action & Contact Plan

Responsibility

The Adult Education Coordinator maintains the emergency plan and coordinates incident follow-up. Drivers are individually responsible for lawful, safe vehicle operation. The sponsor determines insurance requirements.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 12 • MANDATORY REPORTING, SAFEGUARDING & SERIOUS SAFETY CONCERNS

Policy No.	12.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To ensure the ministry responds promptly and lawfully when staff or volunteers know or suspect abuse, neglect, exploitation, or another serious safeguarding concern.

Policy

The ministry will comply with applicable mandatory-reporting requirements. Internal reporting to an Adult Education Coordinator, pastor, safeguarding lead, mentor coordinator, or advisory council member does not replace a report that the law requires to be made to the appropriate public authority. Ministry personnel will not conduct their own investigation in a way that interferes with official reporting or increases risk to the person involved.

Procedures

1. Child abuse or neglect: follow the current child-protection reporting law and official reporting process in the state where the ministry operates. Staff and volunteers should know when a report is required, where it must be made, and any required timing or follow-up documentation.
2. Vulnerable adults: follow the current law and Adult Protective Services or other official reporting process for suspected abuse, neglect, or exploitation of vulnerable adults. Reporting duties may vary according to the person’s circumstances and the setting involved.
3. If a person is in immediate danger or needs emergency medical help, call 911 before or in addition to making the required protective-services report.

4. Do not promise secrecy to a participant, child, or vulnerable adult when a disclosure may trigger a legal reporting obligation. Explain as calmly as possible that The ministry may need to seek help to protect safety.
5. Record only the information needed to document what was observed or reported, when the report was made, to which authority, and any confirmation/reference number. Avoid interviewing multiple witnesses or repeatedly questioning the alleged victim unless needed for immediate safety.
6. Notify the sponsoring organization’s designated safeguarding leader after the required external report when doing so will not endanger the person or interfere with official instructions.
7. Protect reporters and participants from retaliation for good-faith safeguarding reports. Preserve related records and limit access.

Practice Notes

- A report is not the same as an accusation or finding. The appropriate agency determines whether and how to investigate.
- Do not use public AI tools to summarize abuse allegations, safeguarding reports, or identifying incident details.

Documentation

Safeguarding records should be kept in a restricted file rather than in routine mentoring notes or general committee minutes. Maintain report confirmation information when available.

Related Forms

- Set 6 — Mandatory Reporting Acknowledgment
- Set 12 — Child Abuse Reporting Acknowledgment & Quick Reference
- Set 14 — Spiritual Care Concern / Safeguarding Escalation Record
- Set 17 — Incident, Safety & Safeguarding Trend Review

Responsibility

Every person remains responsible for making a legally required report. The Adult Education Coordinator coordinates internal safety response but may not instruct a mandated reporter to withhold a report.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 13 • CHILD SAFETY & CHILDCARE

Policy No.	13.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To protect children who are present during ministry activities and to ensure the site determines whether its childcare arrangement requires state licensure or qualifies for an exemption.

Policy

The ministry will not begin a childcare arrangement until leadership has determined what state licensing or exemption requirements apply and the sponsoring organization has approved the plan. Children will be registered, supervised, released only to authorized people, and protected by screening, sign-in/out, emergency, medication, illness, transportation, and reporting procedures appropriate to the arrangement.

Procedures

1. Before offering regular childcare, complete the Childcare Licensing / Exemption Determination Worksheet and consult the current state or local childcare licensing authority when the arrangement may meet the definition of a regulated child care facility.
2. state guidance states that licensure is generally required for facilities caring for six or more unrelated children under age 13 for any part of the day, while specified statutory exemptions may apply. One listed exemption concerns temporary care operating no more than two days per week during other scheduled or related activities. Do not assume an exemption without documenting the basis.
3. Register each child and maintain current parent/guardian contacts, emergency information, allergies, authorized pickup persons, and special care information needed for safe supervision.

4. Use sign-in/sign-out and headcount procedures. Release a child only to an authorized person under the site's identity-verification procedure. Follow written procedures for late pickup or a custody/release concern.
5. Screen and train child-care workers according to the sponsoring organization's policies and applicable state and local requirements. Maintain appropriate supervision and avoid isolated one-adult/one-child situations when ministry policy requires two-adult or observable environments.
6. Adopt written practices for medication, allergies, illness, toileting/bathroom assistance, discipline, emergency evacuation, reunification, transportation, and incident reporting.
7. Follow the mandatory-reporting policy immediately when abuse or neglect is suspected.

Practice Notes

- Childcare is optional for an Adult Christian Education ministry; if the ministry cannot operate it safely and lawfully, use community childcare referrals or another scheduling model.
- Do not photograph or post children without the separate parent/guardian media permission.

Documentation

Child records are confidential and should be stored separately or distinctly from ordinary participant materials so access is limited to people responsible for childcare and safety.

Related Forms

- Set 12 — Childcare Licensing / Exemption Determination Worksheet
- Set 12 — Child Registration & Parent / Guardian Information
- Set 12 — Authorized Pickup / Child Release Form
- Set 12 — Child Sign-In / Sign-Out Log
- Set 12 — Child Safety & Supervision Standards Acknowledgment
- Set 12 — Child Incident / Injury Report
- Set 12 — Childcare Program Readiness & Policy Adoption Checklist

Responsibility

The Adult Education Coordinator and sponsoring organization determine whether childcare is offered and who leads it. A designated childcare leader administers daily procedures.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 14 • ADULT EDUCATION, EMPLOYMENT, DIGITAL SKILLS & PARTICIPANT LEARNING

Policy No.	14.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To guide practical education, employment, and digital-skills services in a way that is participant-centered, accurate, and safe.

Policy

The ministry will help participants identify education and employment goals, practice skills, access reputable resources, and build digital confidence. Staff and volunteers will not misrepresent credentials, complete dishonest job applications, guarantee employment, or take control of participants' personal accounts.

Procedures

1. Begin with strengths and the participant's stated goals. Use education and job-readiness assessments as planning tools rather than pass/fail judgments.
2. Help participants identify realistic next steps such as adult education, high school equivalency, career/technical training, college exploration, résumé development, interview practice, job-search activity, or workplace-retention planning.
3. When appropriate, refer participants to reputable local workforce-development centers, career centers, community colleges, training providers, and other employment resources that offer job-search assistance, training, career counseling, referrals, or related services.
4. During résumé and application help, maintain honesty. Do not invent employment history, education, credentials, references, job duties, or skills. AI-generated résumé content must be reviewed for accuracy and rewritten in the participant's authentic voice when needed.

5. Teach participants to protect account credentials, recognize scams, verify employer identities, and be cautious with requests for money, banking information, gift cards, or personal documents during online job searches.
6. Obtain appropriate authorization before ministry staff contact an employer to verify information or advocate on a participant's behalf. Share only the information authorized and relevant to the purpose.
7. Document outcomes such as enrollment, credential progress, applications, interviews, employment, or retention without using success measures to shame participants whose circumstances require a different pace.

Practice Notes

- For very low readers, read directions aloud, use examples, reduce unnecessary text, and allow supported practice rather than assuming lack of ability.
- Pair AI practice with instructor feedback, peer discussion, and real-world exercises so participants learn to evaluate rather than merely copy AI outputs.

Documentation

Keep education/employment plans, assessments, authorizations, and outcome summaries in the participant file. Passwords, PINs, verification codes, and banking credentials must not be recorded.

Related Forms

- Set 13 — Education & Learning Background Profile
- Set 13 — Education Goal & Action Plan
- Set 13 — Job-Readiness Self-Assessment
- Set 13 — Employment Goal & Action Plan
- Set 13 — Résumé / Interview / Job Search Forms
- Set 13 — Digital Skills Self-Assessment
- Set 13 — Responsible AI and Online Safety Forms

Responsibility

Education and employment staff/volunteers work under the Adult Education Coordinator. Participants remain responsible for their own applications, accounts, representations, and final employment decisions.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 15 • REFERRALS, COMMUNITY RESOURCES & PARTNERSHIPS

Policy No.	15.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To help participants connect with appropriate community resources while protecting consent, privacy, and participant choice.

Policy

The ministry will build a current network of community resources and make referrals in partnership with participants. A referral is not permission to release confidential records. The ministry will share only the minimum information authorized or legally permitted and will avoid creating dependency on one agency, donor, or informal helper.

Procedures

1. Maintain profiles of frequently used resources, including service area, eligibility basics, contact information, referral method, accessibility considerations, and known limitations. Review key resources periodically for accuracy.
2. Explain a proposed referral to the participant, including what the resource offers, what information the provider may request, and any known costs or eligibility limits. Whenever practical, let the participant choose whether to proceed.
3. Use the Participant Consent to Make a Community Referral for ordinary referral coordination. If confidential records or sensitive information must be sent, use the separate release/exchange authorization from Set 2.
4. Document follow-up at a summary level: whether contact occurred, whether the participant obtained the service, whether another referral is needed, and any system barrier leadership should address.

5. Use written MOUs or partnership agreements when organizations will share space, staff, data, funding, transportation, curriculum, equipment, or recurring responsibilities. Contracts must be signed only by people authorized by the sponsoring organization.
6. Do not accept a partner's data-sharing request merely because it is convenient. Confirm the legal purpose, participant consent, security, and minimum information needed.
7. Review partnerships annually for effectiveness, mission alignment, participant experience, and unresolved risks.

Practice Notes

- A warm referral means helping the participant understand the next step; it does not mean taking over the participant's choices.
- When a participant is turned away by a resource, record the barrier so the ministry can improve its resource network.

Documentation

Maintain resource profiles and partnership agreements in administrative files; participant-specific referrals remain in the participant file or referral log with limited identifying detail.

Related Forms

- Set 7 — Participant Referral to Ministry
- Set 7 — Participant Consent to Make a Community Referral
- Set 7 — Community Resource Referral
- Set 7 — Referral Follow-Up & Outcome Record
- Set 7 — Community Resource / Partner Agency Profile
- Set 7 — Community Partnership / MOU Planning Worksheet

Responsibility

The Adult Education Coordinator or designated networking/referral leader maintains community relationships and confirms that information-sharing follows the privacy policy.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 16 • FINANCIAL ACCOUNTABILITY, DONATIONS, ASSISTANCE & FUND DEVELOPMENT

Policy No.	16.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To protect ministry funds, donors, participants, staff, and the sponsoring organization through clear financial controls and documentation.

Policy

All ministry funds belong to and will be handled through the approved financial system of the legal sponsoring organization unless the ministry itself is a separate authorized legal entity. No single person should control receiving, recording, approving, spending, and reconciling funds without appropriate oversight. Participant assistance will be documented and provided according to written criteria.

Procedures

1. Maintain a budget approved through the sponsor's process. Compare actual income and expenses with budget regularly and address significant variances.
2. Use dual verification for cash counts and deposits when practical. Deposit funds promptly. Do not use personal bank accounts, payment apps, or cash boxes as informal ministry accounts unless the sponsoring organization has specifically approved a controlled process.
3. Provide donor acknowledgments through the qualified sponsoring organization. Current IRS guidance requires a donor to have a written acknowledgment for contributions of $250 or more to substantiate the charitable deduction and requires a written disclosure for certain quid pro quo contributions over $75.

4. For noncash gifts, describe the property received but do not assign the donor's tax-deductible value. Review restricted/designated gifts before acceptance to ensure the ministry can lawfully and practically honor the restriction.
5. Provide participant assistance under written approval limits. Prefer direct payment to a vendor or controlled gift-card process when appropriate. Do not create personal loans between staff/volunteers and participants.
6. Require preapproval for purchases when practical, receipts for reimbursement, and periodic petty-cash reconciliation if petty cash is used.
7. Before public fundraising, confirm state charitable-solicitation requirements with the sponsoring organization. state Secretary of State guidance states that charitable organizations generally register before solicitation unless an exemption applies, and qualifying religious institutions are not required to register under the cited statutory exemption framework.
8. Review grant conditions before applying or accepting funds. Track deadlines, restricted use, reporting, and records required by the funder.

Practice Notes

- Never condition ministry attention, mentoring, or spiritual care on a participant making a donation.
- Do not disclose a participant's hardship story to donors without specific story/media authorization.
- If a donor restriction conflicts with the ministry's mission, participant dignity, law, or the sponsor's policies, decline or renegotiate the gift.

Documentation

Financial records are maintained within or reconciled to the sponsoring organization's official accounting system. Participant assistance details should be limited to what is needed for approval, accountability, and audit.

Related Forms

- Set 11 — Financial Stewardship & Internal Controls Acknowledgment
- Set 11 — Authorized Financial Roles & Approval Matrix
- Set 11 — Budget and Monthly Review Forms
- Set 11 — Donation / Deposit / Donor Acknowledgment Forms
- Set 11 — Participant Assistance Forms
- Set 11 — Purchase, Reimbursement, Petty Cash and Fundraising Forms

- Set 11 — Grant Tracking Forms

Responsibility

The sponsoring organization's authorized financial officers retain final financial authority. The Adult Education Coordinator follows approved limits and provides documentation promptly.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 17 • RECORDS MANAGEMENT, RETENTION, ACCESS & DESTRUCTION

Policy No.	17.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To keep ministry records accurate, useful, secure, and no longer than necessary under the sponsoring organization's adopted retention schedule.

Policy

The ministry will maintain an organized records system that distinguishes participant, volunteer, personnel, financial, child-safety, incident/safeguarding, governance, and public ministry records. Access will be limited by role. Records will be retained and destroyed according to an adopted schedule and any applicable legal, insurance, grant, or sponsor requirements.

Procedures

1. Open participant files using the file checklist and store records in consistent categories. Avoid duplicating the same sensitive document in multiple locations.
2. Maintain case notes that are factual, relevant, and concise. Record what happened, what the participant said or decided when relevant, what the ministry did, and what follow-up is needed. Avoid diagnosis, speculation, gossip, and character judgments.
3. Use access logs or controlled permissions for highly confidential records. Supervisors should periodically review who has electronic or physical access.
4. Adopt a written retention schedule through the sponsoring organization. Do not invent a universal destruction period for every record type; tax, employment, insurance, grant, child-safety, incident, and other records may have different requirements.
5. Suspend routine destruction when records may relate to a pending claim, audit, investigation, subpoena, safeguarding matter, insurance request, or other legal hold.

6. Destroy paper records by secure shredding or equivalent method and electronic records by an approved secure process. Simply deleting a shortcut or moving a file to a recycle bin may not be sufficient.
7. Close participant files systematically when participation ends and document what continuing permissions, follow-up, or retention obligations remain.

Practice Notes

- Records should help the ministry serve and account for its work; they should not become a permanent archive of a participant's most painful experiences.
- Do not use personal cloud drives or personal email as the primary storage location for official confidential records.

Documentation

Use the internal recordkeeping forms to track file setup, access, review dates, retention/destruction, closure, and annual data summaries.

Related Forms

- Set 9 — Participant File Setup & Required Documents Checklist
- Set 9 — Confidential Case Note / Staff Contact Record
- Set 9 — Records Access / File Checkout Log
- Set 9 — Document Review & Renewal Tracker
- Set 9 — Secure Records Inventory & Storage Checklist
- Set 9 — Record Retention / Destruction Log
- Set 9 — Participant File Closure Checklist

Responsibility

The Adult Education Coordinator is responsible for local records administration unless the sponsoring organization designates a records/privacy officer. Financial and personnel records remain under the sponsor's designated custodians.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 18 • PARTICIPANT PROGRESS, EVALUATION, COMPLETION & ALUMNI FOLLOW-UP

Policy No.	18.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To document meaningful participant progress, support goal adjustment, define completion fairly, and conduct alumni follow-up with permission.

Policy

The ministry will use strength-based goals and periodic review rather than a one-size-fits-all measure of success. Completion requirements will reflect participation and the site's stated ministry expectations; a profession of faith, baptism, church membership, or another specific spiritual decision will not be required as a graduation outcome. Alumni contact will occur only under the site's approved follow-up permission.

Procedures

1. Develop goals collaboratively with each participant, beginning with strengths, priorities, and one or more realistic next steps. Review goals when circumstances change rather than treating the original plan as permanent.
2. Conduct periodic progress reviews such as 30/60/90-day check-ins. Ask what the participant believes is going well, what barriers are present, what support is useful, and what should change.
3. Document milestones such as education progress, employment steps, improved routines, stable housing, transportation solutions, digital skills, healthy boundaries, mentoring engagement, or other goals meaningful to the participant.
4. Use attendance and participation records as one source of information, not the sole measure of commitment. When attendance declines, identify barriers and communicate before assuming lack of interest.

5. Before completion or exit, review outstanding referrals, goals, records, media permissions, return of ministry property, and future-contact preferences. Provide a transition plan when useful.
6. For alumni follow-up, use the approved permission form and honor communication preferences. Collect only the outcome information needed for ministry learning and reporting.
7. Use participant feedback in annual improvement. De-identify comments before sharing outside the staff team unless specific permission exists.

Practice Notes

- Celebrate small wins as meaningful evidence of progress.
- If a participant leaves before formal completion, document the transition respectfully and keep the door open for re-entry when appropriate.

Documentation

Maintain goal plans, progress reviews, attendance, milestone records, completion/exit records, evaluations, and alumni permissions in the participant file. Aggregate outcomes may be used for annual review.

Related Forms

- Set 8 — Individual Goal & Action Plan
- Set 8 — 30 / 60 / 90-Day Progress Review
- Set 8 — Participant Achievement & Milestone Record
- Set 8 — Participant Evaluation & Feedback
- Set 8 — Exit Interview & Transition Plan
- Set 8 — Completion / Graduation Forms
- Set 8 — Alumni Follow-Up & Permission Forms

Responsibility

The Adult Education Coordinator coordinates completion standards and annual outcomes. Mentors and instructors contribute appropriate progress information without making final eligibility decisions outside their authority.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 19 • FACILITY, ACCESSIBILITY, MEETINGS & DAY-TO-DAY OPERATIONS

Policy No.	19.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To ensure routine operations are organized, accessible, safe, and sustainable.

Policy

The ministry will use facilities that are reasonably suitable for the activities offered and will plan for accessibility, privacy, technology, storage, emergency response, childcare when offered, and participant comfort. Regular meetings and administrative routines will be documented enough to provide continuity without generating unnecessary paperwork.

Procedures

1. Before launch and at least annually, review facility access, parking, entrances, restrooms, classroom/meeting space, private conversation areas, lighting, emergency exits, severe-weather locations, technology, record storage, and other practical needs.
2. Identify accessibility barriers and determine reasonable solutions or alternate arrangements through the sponsoring organization. Ask participants what support is useful rather than making assumptions about disability or literacy needs.
3. Maintain a ministry calendar for classes, Bible study, mentoring, advisory council meetings, reports, renewals, insurance reviews, volunteer training, and major events.
4. Use meeting agendas and action lists for leadership and advisory meetings. Assign owners and due dates to decisions that require follow-up.
5. Conduct a brief monthly administrative review of participant files, permissions, referrals, incidents, volunteer status, upcoming deadlines, and unresolved action items.

6. Keep emergency contact information, approved policies, and current forms accessible to authorized leaders. Remove obsolete forms from active use when a revision is adopted.
7. When the ministry changes location or adds a new service, repeat the readiness review for safety, privacy, accessibility, insurance, and recordkeeping implications.

Practice Notes

- Privacy requires physical design as well as policy. Avoid conducting sensitive intake conversations where other participants can overhear.
- A simple, reliable system is better than a complex system that volunteers cannot consistently follow.

Documentation

Maintain facility readiness checklists, calendars, meeting records, monthly administrative reviews, and document-control records.

Related Forms

- Set 10 — Facility, Accessibility & Site Readiness Checklist
- Set 10 — First-Semester Launch Calendar
- Set 9 — Monthly Administrative Review Checklist
- Set 15 — Meeting Agenda and Minutes Templates
- Set 17 — Annual Calendar & Deadline Planner

Responsibility

The Adult Education Coordinator manages day-to-day operations. Facility owners and the sponsoring organization remain responsible for matters within their legal control.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

SECTION 20 • QUALITY ASSURANCE, ANNUAL REVIEW, RISK REVIEW & CONTINUOUS IMPROVEMENT

Policy No.	20.0	**Effective**	Upon adoption
Applies To	All ministry staff, instructors, tutors, volunteers, mentors, leaders, and participants as applicable	Review	At least annually

Purpose

To ensure the ministry reviews its effectiveness, safety, stewardship, participant experience, and sustainability at least annually and acts on what it learns.

Policy

The ministry will conduct an annual operational and ministry review using aggregate information, participant feedback, incident trends, financial review, volunteer/staff capacity, partnership effectiveness, policy compliance, and leadership reflection. The purpose is learning and improvement, not creating quotas or reducing ministry effectiveness to numbers alone.

Procedures

1. Complete the annual site operations and ministry effectiveness reviews. Identify strengths worth preserving, problems requiring action, and practices that should be simplified or discontinued.
2. Review participant outcomes and feedback using both quantitative and qualitative information. Protect privacy by using aggregate or de-identified data in leadership and advisory council review.
3. Review attendance, mentoring capacity, volunteer/staff retention, referrals, community partnerships, safeguarding trends, privacy/data security, technology/AI, facility readiness, financial sustainability, insurance, and major compliance changes.
4. Develop a written quality improvement plan with specific actions, responsible people, target dates, and follow-up. Do not allow annual review to end with a list of concerns and no owner.

5. Review leadership continuity and critical-role backups. Confirm that more than one authorized person knows how to access essential contacts, records, financial processes, emergency information, and calendar obligations.
6. Prepare required sponsoring-organization, grant, accrediting, local, or state reports using accurate aggregate data. If data is incomplete, state the limitation rather than guessing or presenting estimates as exact counts.
7. Record policy and form revisions with adoption dates. Replace obsolete copies so staff do not continue using outdated permissions or procedures.

Practice Notes

- Improvement should be realistic. Choose a few high-value changes with owners and deadlines rather than producing an unmanageable list.
- A ministry can be faithful and still need to change a process that is confusing, unsafe, duplicative, or burdensome.

Documentation

Annual review records, improvement plans, sign-offs, calendars, and aggregate reports are maintained in administrative/governance files. Participant-identifying data should not be copied into annual review forms unless truly necessary.

Related Forms

- Set 17 — Annual Site Operations Review
- Set 17 — Annual Ministry Effectiveness Evaluation
- Set 17 — Participant Outcomes and Feedback Summaries
- Set 17 — Annual Privacy / AI / Safety / Financial / Partnership Reviews
- Set 17 — Ministry Quality Improvement Plan
- Set 17 — Annual Leadership Review & Sign-Off

Responsibility

The Adult Education Coordinator leads the annual review with input from staff, mentors, participants, advisory council, financial leadership, and the sponsoring organization as appropriate.

Review

Adult Education Coordinator and sponsoring organization review this policy at least annually and after a significant incident, legal change, insurance change, or operational change.

APPENDIX A • Safeguarding & Regulatory Quick Reference

Current-source caution

Agency instructions, statutes, rules, contact numbers, and thresholds can change. Site leadership should verify current official guidance during annual policy review and before relying on a number or legal threshold in a high-stakes situation.

Child Abuse & Neglect Reporting

Child abuse or neglect reporting requirements vary by state. Every ministry should identify the current child-protection reporting law, reporting agency, hotline or online reporting process, and any timing or documentation requirements that apply where the ministry operates. Staff and volunteers should know that internal notification does not replace a legally required external report. In an immediate emergency, call 911 or the appropriate emergency service.

Local customization: Insert the current official child-protection reporting agency, reporting instructions, and contact information for your state.

Vulnerable Adult Reporting

Vulnerable-adult reporting requirements also vary by state and setting. The sponsoring organization should identify when staff or volunteers must report suspected abuse, neglect, exploitation, or self-neglect of a vulnerable adult, which agency receives the report, and whether different procedures apply in private homes, licensed facilities, or other settings.

Local customization: Insert the current Adult Protective Services or other vulnerable-adult reporting agency and official reporting instructions for your state.

Childcare Licensure / Exemptions

Childcare licensing, exemption, staffing, health, training, background-check, and ratio requirements vary by state and by the type and frequency of care offered. Before providing recurring childcare, the ministry should verify its specific arrangement with the appropriate state or local licensing authority, sponsoring organization, and insurance carrier rather than assuming that a church or ministry exemption applies.

Local customization: Insert the current childcare licensing or regulatory agency and official guidance for your state.

Automobile Liability Insurance

Automobile insurance and financial-responsibility requirements vary by state. Before transporting participants, the sponsoring organization should confirm driver eligibility, required insurance limits, vehicle-use rules, background or driving-record checks, and any higher requirements imposed by its insurance carrier.

Local customization: Insert current state insurance or motor-vehicle requirements and the sponsoring organization's transportation standards.

Charitable Solicitation

Charitable-solicitation registration and exemption rules vary by state. Before public fundraising, grant solicitation, online giving campaigns, or special events, the sponsoring organization should confirm whether registration, exemption notices, disclosures, permits, or other requirements apply to its legal entity and fundraising activity.

Local customization: Insert the current charitable-solicitation regulator and official guidance for each state in which the sponsoring organization solicits contributions.

APPENDIX B • Federal & Practice Reference Notes

Charitable Contribution Acknowledgments

Current IRS guidance explains that a donor claiming a charitable deduction for a contribution of $250 or more must obtain a written acknowledgment from the charitable organization and that a charitable organization must provide a written disclosure statement for certain quid pro quo contributions over $75. Use the sponsoring organization's qualified legal name and current financial procedures.

Official source: Internal Revenue Service — Substantiation and Disclosure Requirements

AI Privacy & Risk Management

The Federal Trade Commission has cautioned that users may reveal sensitive or confidential information when using AI services and emphasizes that companies must honor privacy and confidentiality commitments. NIST's AI Risk Management Framework is a voluntary framework for managing AI risks and identifies trustworthiness considerations including safety, security, privacy, accountability, transparency, reliability, explainability, and fairness. the ministry's policy uses these principles conservatively by minimizing sensitive data, requiring human review, and prohibiting AI-only consequential decisions.

Official sources: Federal Trade Commission — AI Privacy and Confidentiality

National Institute of Standards and Technology — AI Risk Management Framework

Workforce Resources

Local workforce-development centers, community colleges, public libraries, career and technical education providers, vocational rehabilitation agencies, and reputable nonprofit partners may provide job placement assistance, training, career counseling, referrals, digital access, and job-search tools. Adult Christian Education ministries should build a current local referral network rather than relying on a single provider.

Local customization: List the primary workforce-development, adult education, and career-training resources in your community.

APPENDIX C • Responsibility Matrix

Role	Primary Responsibilities
Sponsoring Organization	Governing authority; insurance; contracts; legal/HR/financial systems; approval of high-risk policies and major changes.
Adult Education Coordinator	Day-to-day ministry leadership; implementation of policies; participant process; staff/volunteer supervision; records coordination; annual review.
Mentor Coordinator / Designee	Mentor screening completion, matching, orientation, support, rematching, boundary concerns, and mentoring records.
Bible Study / Spiritual Care Leader	Bible-study coordination, spiritual-care boundaries, prayer/privacy practices, and appropriate referrals.
Financial Officer / Sponsor Treasurer	Budget controls, deposits, donor records, reconciliations, reimbursements, assistance disbursement, grant/financial reporting.
Childcare Leader, if applicable	Child registration, supervision, release, medication/illness practices, emergency procedures, worker eligibility, and licensure/exemption documentation.
Advisory Council	Advice, community connection, prayer, resource development, accountability, review, and recommendations within granted authority.
All Staff / Volunteers / Mentors	Confidentiality, boundaries, safety, mandatory reporting, approved communication, responsible technology/AI use, and prompt reporting of concerns.

APPENDIX D • Master Forms Index

This index connects the policy manual to a suggested ministry forms system. A form is not automatically required simply because it exists. Ministry leadership should identify which forms are required, optional, conditional, or not applicable based on the services actually provided and the sponsoring organization's adopted policies.

Set 1 — Application & Intake

- Initial Application
- Participant Application & Intake
- Strengths, Goals & Support Planning
- Emergency Contact & Communication Preferences
- Intake Interview Summary
- Enrollment & Next Steps

Set 2 — Privacy & Confidentiality

- Participant Privacy & Confidentiality Notice
- Acknowledgment of Privacy Practices & Limits of Confidentiality
- Participant Confidentiality Agreement
- Authorization to Release / Exchange Information
- Revocation of Authorization
- Digital Privacy & Responsible AI Acknowledgment
- Staff / Volunteer Confidentiality Agreement

Set 3 — Media, Social Media & Communications

- Participant Photo, Video & General Media Release
- Social Media & Online Publication Consent
- Participant Story / Testimonial Release
- Communication Preferences & Consent
- Virtual Meetings & Online Participation Agreement
- Revocation / Change of Media or Communication Permission
- Staff / Volunteer Digital Communication & Social Media Boundaries Agreement
- Optional Parent / Guardian Media Release for a Minor Child

Set 4 — Participant Covenant, Rights & Boundaries

- Participant Rights & Responsibilities
- Participant Covenant & Commitment Agreement
- Christian Ministry & Bible Study Acknowledgment
- Mentoring Relationship & Boundaries Agreement
- Participant Code of Conduct & Safety Expectations
- Attendance, Communication & Participation Agreement
- Participant Concern, Grievance & Appeal Procedure
- Participant Concern / Grievance / Appeal Form

Set 5 — Safety, Emergency & Liability

- Participant Emergency & Safety Information
- Emergency Medical Authorization
- General Participation & Assumption of Risk Acknowledgment
- Transportation Permission & Release
- Staff / Volunteer Driver Authorization
- Transportation Trip Log
- Incident / Accident Report
- Safety Concern / Near-Miss Report
- Site Emergency Action & Contact Plan
- Weather / Emergency Closing & Communication Acknowledgment

Set 6 — Mentor & Volunteer Forms

- Mentor / Volunteer Application
- Service Preferences, Skills & Availability Profile
- Personal / Ministry Reference Form
- Background Screening Disclosure & Authorization
- Confidentiality & Records Acknowledgment
- Mentor / Volunteer Boundaries Agreement
- Code of Conduct & Safe Ministry Standards
- Mandatory Reporting Acknowledgment
- Orientation & Training Record
- Mentor / Volunteer Covenant
- Volunteer / Mentor Exit & Separation Record

Set 7 — Referrals & Community Partners

- Participant Referral to Ministry
- Participant Consent to Make a Community Referral
- Community Resource Referral
- Referral Follow-Up & Outcome Record
- Community Resource / Partner Agency Profile
- Community Partner Contact & Networking Record
- Community Partnership / MOU Planning Worksheet
- Referral Tracking Log

Set 8 — Participant Progress, Completion & Alumni

- Individual Goal & Action Plan
- 30 / 60 / 90-Day Progress Review
- Mentoring Contact & Progress Record
- Attendance & Participation Record
- Participant Achievement & Milestone Record
- Goal Update / Plan Revision Form
- Participant Evaluation & Feedback
- Exit Interview & Transition Plan
- Completion / Graduation Record
- Completion / Graduation Checklist
- Alumni Follow-Up & Outcome Record
- Permission for Future Follow-Up
- Participant Status Change / Re-Entry Record

Set 9 — Internal Administration & Recordkeeping

- Participant File Setup & Required Documents Checklist
- Master Participant Enrollment & Status Summary
- Confidential Case Note / Staff Contact Record
- Staff Follow-Up & Action Log
- Mentor Assignment / Change Record
- Privacy, Release & Media Permission Tracking Record
- Incident, Safety & Reporting Tracking Log
- Records Access / File Checkout Log

- Document Review & Renewal Tracker
- Secure Records Inventory & Storage Checklist
- Record Retention / Destruction Log
- Participant File Closure Checklist
- Monthly Administrative Review Checklist
- Annual Ministry Data Summary Worksheet
- Set 9 Quick Use Guide

Set 10 — Site Leadership & New Ministry Start-Up

- Adult Christian Education Ministry Profile
- Sponsoring Organization & Governance Information
- Ministry Leadership Team Roster & Responsibility Map
- Adult Education Coordinator Leadership Acknowledgment
- Community Needs Assessment Summary
- Participant Population & Service Area Profile
- Ministry Services & First-Semester Plan
- Advisory Council Roster & Expertise Matrix
- Advisory Council Commitment Acknowledgment
- Facility, Accessibility & Site Readiness Checklist
- Technology, Records & Data Security Readiness Checklist
- Start-Up Budget & Funding Plan
- Insurance, Legal & Risk Review Checklist
- Volunteer, Mentor & Staffing Readiness Plan
- Recruitment, Communication & Community Awareness Plan
- First-Semester Launch Calendar
- Core Ministry Readiness Review
- Policies & Forms Adoption Checklist
- Final New-Site Launch Readiness Review
- First 90-Day Leadership Review
- Set 10 Quick Use Guide

Set 11 — Financial Accountability, Donations & Fund Development

- Financial Stewardship & Internal Controls Acknowledgment
- Authorized Financial Roles & Approval Matrix
- Annual / Start-Up Budget Worksheet
- Monthly Budget-to-Actual Review
- Donation Receipt & Deposit Log
- Donor Acknowledgment / Receipt Template
- In-Kind Donation Acceptance & Receipt
- Restricted / Designated Gift Review & Acceptance
- Participant Assistance Request
- Participant Assistance Approval & Disbursement Record
- Gift Card / Direct Assistance Distribution Log
- Purchase Request & Pre-Approval
- Expense Reimbursement Request
- Petty Cash / Small Cash Fund Log & Reconciliation
- Deposit Preparation & Dual-Verification Record
- Fundraising Activity Proposal & Approval
- Fundraising Cash Count & Reconciliation
- Grant Opportunity Review & Approval
- Grant Award Tracking & Reporting Record
- Financial Conflict of Interest Disclosure
- Monthly Financial Review Checklist
- Annual Financial Accountability Review
- Financial Records Retention Checklist
- Set 11 Quick Use & Compliance Guide

Set 12 — Child Safety & Childcare

- Childcare Licensing / Exemption Determination Worksheet
- Child Registration & Parent / Guardian Information
- Child Emergency Contact & Medical Authorization
- Allergy, Medication & Special Care Information
- Authorized Pickup / Child Release Form
- Childcare Participation Agreement & Parent Responsibilities

- Child Sign-In / Sign-Out Log
- Child Attendance & Headcount Record
- Childcare Staff / Volunteer Assignment & Supervision Log
- Child Safety & Supervision Standards Acknowledgment
- Childcare Worker / Volunteer Screening & Eligibility Checklist
- Child Abuse Reporting Acknowledgment & Quick Reference
- Child Incident / Injury Report
- Child Safety Concern / Near-Miss Report
- Medication Policy & Parent Authorization
- Child Illness / Exclusion / Return Notice
- Emergency Evacuation & Family Reunification Plan
- Childcare Room Opening / Closing Safety Checklist
- Child Transportation Permission & Trip Authorization
- Childcare Program Readiness & Policy Adoption Checklist
- Set 12 Quick Use Guide

Set 13 — Adult Education, Employment & Digital Skills

- Education & Learning Background Profile
- Education Goal & Action Plan
- Adult Education / High School Equivalency Referral & Progress Record
- Training / Certificate / College Exploration Worksheet
- Job-Readiness Self-Assessment
- Employment Goal & Action Plan
- Work History, Skills & Strengths Inventory
- Transferable Skills & Workplace Strengths Worksheet
- Résumé Development Worksheet
- Job Application Preparation Checklist
- Interview Preparation Worksheet
- Mock Interview Feedback Form
- Employer Contact & Verification Authorization
- Job Search Activity Log
- Employment Offer / Job Placement Record
- 30 / 60 / 90-Day Employment Follow-Up

- Digital Skills Self-Assessment
- Computer, Internet & Device Access Plan
- Email & Online Account Safety
- Responsible AI Use for Education & Job Readiness
- AI-Assisted Résumé / Application Review
- Online Job Scam & Privacy Safety
- Digital Skills Instructor Observation
- Workplace Success & Retention Plan
- Education & Employment Outcome Summary
- Set 13 Quick Use Guide

Set 14 — Spiritual Care, Prayer & Church Connection

- Participant Spiritual Care Preferences
- Prayer Request & Permission
- Confidential Prayer Team Referral
- Bible Study Participation Record
- Bible Study Leader Session Record
- Spiritual Conversation & Follow-Up Record
- Church Connection & Pastoral Referral Consent
- Participant-Initiated Spiritual Follow-Up Request
- Spiritual Resources Request & Distribution Record
- Spiritual Care Contact Log
- Participant Spiritual Care Boundaries Acknowledgment
- Mentor / Volunteer Spiritual Conversation Boundaries
- Prayer Team Confidentiality Covenant
- Spiritual Care Leader / Bible Study Volunteer Covenant
- Spiritual Care Referral & Follow-Up Log
- Spiritual Care Concern / Safeguarding Escalation Record
- Grief, Loss & Spiritual Support Referral Consent
- Participant Spiritual Care Feedback
- Spiritual Care Ministry Readiness & Quick Use Guide

Set 15 — Advisory Council & Governance

- Advisory Council Purpose & Structure Adoption
- Advisory Council Member Interest / Nomination
- Advisory Council Member Information
- Skills, Experience & Community Connections Inventory
- Advisory Council Member Covenant
- Roles & Responsibilities Acknowledgment
- Term of Service, Renewal & Rotation Record
- Advisory Council Confidentiality Agreement
- Conflict of Interest Disclosure
- New Member Orientation Checklist
- Annual Advisory Council Roster & Terms
- Annual Meeting Calendar & Participation Plan
- Meeting Agenda Template
- Meeting Minutes Template
- Attendance, Recusal & Action Item Log
- Committee / Task Group Assignment
- Adult Education Coordinator Report to Advisory Council
- Community Needs & Resource Advisory Input
- Participant Voice & Outcome Review
- Policy, Risk, Privacy & Safeguarding Review
- Advisory Council Recommendation Record
- Annual Council Self-Evaluation
- Individual Member Annual Reflection
- Member Exit & Transition Record
- Annual Governance Review & Quick Use Guide

Set 16 — Staff & Leadership Personnel Forms

- Position Profile / Job Description Template
- Staff / Leadership Application
- Candidate Interview & Selection Record
- Personnel File Setup Checklist
- New Staff Onboarding Checklist

- Employment / Service Status & Compensation Record
- Staff Emergency Contact
- Role Expectations & Code of Conduct
- Conflict of Interest & Outside Activities Disclosure
- Personnel Privacy, Technology & AI Acknowledgment
- Work Schedule & Timekeeping Record
- Leave / Absence Request
- Supervision Meeting Record
- 30 / 60 / 90-Day Staff Review
- Annual Performance Review
- Professional Development Plan
- Training & Credentials Renewal Tracker
- Corrective Coaching / Performance Improvement Record
- Workplace Concern / Grievance Form
- Workplace Support / Accommodation Routing Form
- Personnel Records Access Log
- Separation / Exit Checklist
- Exit Interview
- Final Personnel File Closure Checklist
- New-Hire Compliance Checklist
- Set 16 Quick Use Guide

Set 17 — Operations, Quality Assurance & Annual Evaluation

- Annual Site Operations Review
- Annual Ministry Effectiveness Evaluation
- Participant Outcomes Summary
- Participant Experience & Feedback Summary
- Attendance & Engagement Trend Review
- Mentor / Volunteer Capacity & Retention Review
- Staff & Leadership Capacity Review
- Incident, Safety & Safeguarding Trend Review
- Privacy, Records & Data Security Annual Review
- Technology & Responsible AI Practices Review

- Community Partnership Effectiveness Review
- Referral System Effectiveness Review
- Advisory Council Effectiveness Review
- Financial Stewardship & Resource Sustainability Review
- Facility, Accessibility & Operational Readiness Review
- Policies, Forms & Document Control Review
- Compliance, Insurance & Risk Review
- Ministry Quality Improvement Plan
- Corrective Action / Improvement Follow-Up
- Leadership Continuity & Succession Plan
- Critical Role Backup & Continuity Plan
- Annual Calendar & Deadline Planner
- Annual Report Preparation Worksheet
- Annual Leadership Review & Sign-Off
- Quick Use Guide

APPENDIX E • Form Use, Filing & Confidentiality Guide

Record Type	Filing & Typical Access	Key Control
Participant application/intake	Participant confidential file; access limited to authorized intake/leadership staff.	Use only current adopted versions.
Privacy / releases / media	Participant confidential file plus permission tracker; communications staff see only what they need.	Check permission before each public use.
Mentor / volunteer screening	Volunteer/mentor file; access limited to the Adult Education Coordinator or designated screening staff.	Keep screening data separate from participant records.
Incidents / safeguarding	Restricted incident/safeguarding file; access limited to need-to-know leadership and required authorities.	Do not place detailed allegations in general minutes.
Childcare	Restricted childcare records; access limited to authorized childcare and leadership staff.	Verify licensure/exemption status before operation.
Financial	Sponsor accounting or secure finance files; access limited to authorized financial leadership.	Keep participant-assistance details minimal.
Personnel	Sponsor personnel file; access limited to authorized employer/HR leadership.	ministry forms supplement official HR/payroll records.
Annual review	Administrative/governance file; leadership/advisory council access as appropriate.	Use aggregate or de-identified participant information.

Required / Optional / Conditional Designation

- Required: a form the local site has adopted as a standard part of participation or operations.
- Conditional: used only when the triggering activity occurs, such as transportation, childcare, media publication, participant assistance, or a safeguarding report.
- Optional: available when useful but not necessary for every participant or ministry cycle.
- Not Applicable: retained in the master system but not used because the site does not offer the related activity.

Annual Form-Control Check

- Confirm the current version and revision date.
- Remove obsolete copies from shared drives, binders, and intake desks.
- Confirm that required signatures and local contact names are current.
- Review legal/insurance-sensitive forms after a significant law, insurer, or sponsor policy change.
- Confirm that electronic forms use secure storage and do not automatically expose participant data to unnecessary third parties.

APPENDIX F • Suggested Annual Policy & Operations Calendar

Month	Suggested Review Focus
January	Review prior-year outcomes; close/organize records; confirm annual report data; refresh emergency contacts.
February	Review participant application/intake forms, privacy releases, and mentoring/volunteer status before new enrollment cycles.
March	Review technology, password/access lists, AI practices, equipment, and digital-skills resources.
April	Review community resource directory, partnerships, referral procedures, and advisory council membership.
May	Review child-safety/childcare status before summer activities; verify background-screening and training records.
June	Midyear financial review; donor acknowledgments; grant deadlines; participant-assistance controls.
July	Facility, transportation, insurance, severe-weather, and emergency-plan review before fall programming.
August	Staff/volunteer orientation; confidentiality, safeguarding, social media, technology, and mentoring refresher.
September	Participant progress and retention review; identify barriers and needed referral/resource changes.
October	Advisory council effectiveness review; leadership continuity; next-year planning and budget assumptions.
November	Prepare annual ministry reporting; review form revisions and policy changes needed for next year.

December	Complete annual operations/quality review, improvement plan, policy adoption updates, and revision history.

APPENDIX G • Revision History & Annual Adoption

Revision History

Revision Date	Section(s)	Summary of Change	Approved By

Annual Review & Adoption

By signing below, local leadership acknowledges that the manual has been reviewed for the coming ministry year and that local contact information, forms, emergency procedures, and major operating practices have been updated as needed. Legal, insurance, employment, tax, and regulatory questions should be referred to the sponsoring organization and qualified professionals.

Adult Education Coordinator	______________________________
Authorized Sponsoring Organization Representative	______________________________
Advisory Council Chair / Representative (if used)	______________________________
Date of Annual Review	______________________________
Next Review Due	______________________________

APPENDIX H • Implementation Checklists

These checklists are quick-use leadership tools. They do not replace the detailed policies or the full forms. A site may copy a checklist into its annual planning binder or use it during leadership meetings.

New Ministry Launch Checklist

☐ Legal sponsoring organization and governing authority identified.

☐ Adult Education Coordinator and leadership responsibilities documented.

☐ Insurance coverage reviewed for planned activities.

☐ Required applicable local, state, sponsoring-organization, or accrediting requirements confirmed.

☐ Facility and accessibility review completed.

☐ Privacy, records, technology, and AI practices adopted.

☐ Mentor/volunteer screening and orientation process ready.

☐ Emergency and safeguarding procedures posted and trained.

☐ Budget, banking, donation, and purchasing controls approved.

☐ Participant application, intake, covenant, and consent forms ready for use.

Notes / Follow-Up

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Participant Intake & Enrollment Checklist

☐ Initial Application completed before collecting detailed information.

☐ Participant received an explanation of the ministry's Christian identity and Bible-study expectations.

☐ Privacy notice and confidentiality limits reviewed.

☐ Communication preferences documented.

☐ Application/intake information reviewed only by authorized staff.

☐ Strengths and participant priorities identified.

☐ Immediate safety or urgent referral needs addressed.

☐ Required participant agreements completed.

☐ Optional media/social-media choices kept separate from enrollment.

☐ Participant file opened and enrollment status recorded.

Notes / Follow-Up

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Privacy & Records Checklist

- ☐ Only information needed for a legitimate ministry purpose is collected.
- ☐ Participant files are stored in a controlled physical or electronic location.
- ☐ Access is limited by role and reviewed when roles change.
- ☐ Release authorizations are specific and current.
- ☐ Revocations are tracked and honored prospectively.
- ☐ Case notes are factual and concise.
- ☐ No participant passwords, PINs, or verification codes are recorded.
- ☐ No identifiable confidential records are entered into public AI tools.
- ☐ Retention/destruction follows the sponsor's adopted schedule.
- ☐ Legal holds or pending matters suspend routine destruction when required.

Notes / Follow-Up

Technology & Responsible AI Checklist

☐ Approved technology systems are identified.

☐ Users have individual access when practical rather than shared passwords.

☐ Departing staff/volunteer access is removed promptly.

☐ AI demonstrations use fictitious or de-identified examples whenever possible.

☐ Participants are taught not to enter sensitive personal information into public AI tools.

☐ AI-assisted résumés/applications are reviewed for truth and accuracy.

☐ Important AI-generated information is independently verified.

☐ AI does not make admission, discipline, employment, assistance, or safeguarding decisions.

☐ Vendor privacy/security practices are reviewed before sensitive use.

☐ Technology incidents are documented and escalated appropriately.

Notes / Follow-Up

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Media, Social Media & Communications Checklist

- ☐ General media permission is separate from social-media permission.
- ☐ Story/testimonial permission is separate from ordinary photo permission.
- ☐ Participant permission choices are easy for staff to verify.
- ☐ Declining publicity does not by itself affect ministry participation.
- ☐ Official communication channels are used when practical.
- ☐ Staff/mentors understand personal social-media boundaries.
- ☐ Screenshots and virtual-meeting images are not shared without permission.
- ☐ Minor-child media permission is obtained from a parent/guardian.
- ☐ Revoked permissions are updated in the tracker.
- ☐ Sensitive participant stories are never published merely because they are inspiring.

Notes / Follow-Up

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Mentoring Administration Checklist

- ☐ Mentor application, references, screening, and orientation are complete.
- ☐ Participant and mentor preferences/availability are considered in matching.
- ☐ Mentoring boundaries are reviewed at the beginning of the match.
- ☐ Communication and meeting expectations are clear.
- ☐ Gift, money, transportation, and social-media boundaries are clear.
- ☐ Mentor understands confidentiality limits and mandatory reporting.
- ☐ Contact/progress records stay summary-level.
- ☐ Mentor knows how to request help or report a concern.
- ☐ Participant knows how to request a rematch.
- ☐ Closure or rematch is documented respectfully when needed.

Notes / Follow-Up

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Staff & Volunteer Readiness Checklist

- ☐ Written role description is current.
- ☐ Application/interview/selection record is complete as applicable.
- ☐ Screening level matches access and responsibilities.
- ☐ Confidentiality, boundaries, and conduct expectations are signed.
- ☐ Mandatory-reporting training is current.
- ☐ Emergency procedures are reviewed.
- ☐ Technology, AI, and social-media expectations are reviewed.
- ☐ Supervisor and reporting line are clear.
- ☐ Training/professional-development needs are documented.
- ☐ Exit procedures include keys, devices, passwords/access, and records transfer.

Notes / Follow-Up

Safety & Emergency Checklist

- ☐ Site address and emergency contacts are readily available.
- ☐ Fire exits and severe-weather locations are known.
- ☐ Emergency medical response process is understood.
- ☐ Incident and near-miss forms are accessible.
- ☐ First-aid resources are checked according to local practice.
- ☐ Drivers are authorized under sponsor policy before transporting participants.
- ☐ Vehicle insurance requirements are verified.
- ☐ Weather/closing communication procedures are current.
- ☐ Serious incidents are routed to sponsor/insurer as required.
- ☐ Immediate danger is handled through 911 rather than delayed by internal reporting.

Notes / Follow-Up

Safeguarding & Mandatory Reporting Checklist

☐ Current state child-abuse reporting instructions are available.

☐ Current state vulnerable-adult reporting instructions are available.

☐ Staff/volunteers know internal reporting does not replace legally required external reporting.

☐ No one is instructed to investigate allegations independently.

☐ No promise of absolute secrecy is made when reporting may be required.

☐ Immediate danger triggers 911 when appropriate.

☐ Reports are documented factually with date, agency, and confirmation information when available.

☐ Safeguarding records are access-restricted.

☐ Retaliation for good-faith reports is prohibited.

☐ Annual refresher training is documented.

Notes / Follow-Up

Childcare Readiness Checklist

- ☐ Licensure/exemption determination is documented before operation.
- ☐ Sponsoring organization has approved the childcare arrangement.
- ☐ Child registration and emergency information are current.
- ☐ Authorized pickup procedures are in place.
- ☐ Sign-in/sign-out and headcount procedures are used.
- ☐ Worker screening/eligibility requirements are complete.
- ☐ Allergy, medication, illness, and emergency practices are adopted.
- ☐ Supervision and bathroom/toileting procedures are clear.
- ☐ Child incident/injury reporting forms are ready.
- ☐ Parent/guardian media permission is separate from childcare enrollment.

Notes / Follow-Up

Financial Accountability Checklist

- ☐ Budget is approved through the sponsor's process.
- ☐ Financial roles and approval limits are documented.
- ☐ Cash/deposit procedures include appropriate verification.
- ☐ No personal bank account or unapproved payment app is used for ministry funds.
- ☐ Donor acknowledgments use the qualified sponsoring organization's information.
- ☐ Restricted gifts are reviewed before acceptance.
- ☐ Participant assistance is approved and documented under written criteria.
- ☐ Reimbursements require appropriate receipts/approval.
- ☐ Grant restrictions and reporting deadlines are tracked.
- ☐ Monthly and annual financial reviews are completed.

Notes / Follow-Up

Community Referral & Partnership Checklist

☐ Frequently used resource information is current.

☐ Participant understands and agrees to the referral when consent is appropriate.

☐ A referral is not treated as blanket permission to release records.

☐ Separate authorization is used when confidential records must be shared.

☐ Only minimum necessary information is exchanged.

☐ Referral follow-up is documented without excessive detail.

☐ MOUs are used when recurring responsibilities or data/resource sharing require clarity.

☐ Only authorized sponsor representatives sign contracts.

☐ Partnership effectiveness is reviewed annually.

☐ Barriers encountered by participants are used to improve the resource network.

Notes / Follow-Up

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Participant Progress & Completion Checklist

☐ Goals are participant-centered and strength-based.

☐ Progress reviews occur on the site's planned schedule.

☐ Barriers are identified before attendance problems are labeled as motivation problems.

☐ Milestones and small wins are documented.

☐ Goal plans are revised when circumstances change.

☐ Completion requirements are explained in advance.

☐ A spiritual decision is not used as a graduation requirement.

☐ Exit/transition needs and referrals are reviewed.

☐ Future-contact permission is documented before alumni follow-up.

☐ Participant feedback is included in annual improvement.

Notes / Follow-Up

Annual Review & Improvement Checklist

- ☐ Annual operations review completed.
- ☐ Participant outcomes and feedback reviewed in aggregate/de-identified form.
- ☐ Mentor/volunteer capacity and retention reviewed.
- ☐ Safety/safeguarding trends reviewed.
- ☐ Privacy, records, technology, and AI practices reviewed.
- ☐ Community partnerships and referral effectiveness reviewed.
- ☐ Financial sustainability and controls reviewed.
- ☐ Facility, accessibility, insurance, and risk reviewed.
- ☐ Improvement actions have owners and due dates.
- ☐ Policy/form revisions are documented and obsolete versions removed from use.

Notes / Follow-Up

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Adult Christian Education

Policies & Procedures Manual

Closing Principle

Good policies should help people serve with greater confidence, not create distance between ministry leaders and the people they serve. Use these procedures to protect dignity, strengthen accountability, reduce confusion, and keep Christ-centered compassion at the heart of Adult Christian Education.

End of Manual