

Sisters of St Joseph of Annecy

Baseline Audit Report
July 2026

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1. Introduction

1.1 This report is a baseline audit of the safeguarding arrangements for the Sisters of St Joseph of Annecy. This audit has been undertaken as part of the CSSA programme of baseline audits for Religious Life Groups (RLGs) in England and Wales.

1.2 The Sisters of St Joseph of Annecy is an international Roman Catholic Congregation that was founded in France in 1650 where its Generalate is located. It is divided into a number of distinct provinces and regions across the world, including France, Wales and Ireland, Senegal, The Gambia, The Republic of Congo, Tanzania, Kenya and India.

1.3 Across the English province, there are currently 36 Sisters in total, who reside within six communities, three in Newport, one in Cwmbran, one in Tonypany and one in New Inn, South Wales. Of these, only 11 are engaged in active ministry, including parish work, spiritual accompaniment, therapeutic massage, school governorship, and the care for elderly Sisters. The average age of Sisters is 78. Those requiring assistance with care needs are supported at New Inn Convent, a convent in New Inn with qualified nursing and care staff. This facility is overseen by Trustees and managed by a Clinical Lead, who holds responsibility for staff supervision and line management. The provision is not registered with the Care Inspectorate Wales (CIW), as the care provided does not fall within the scope of regulated activities requiring registration.

1.4 Each community is led by a Community Leader, some of whom also serve as a Trustee and oversee the smooth running of day-to-day operations. This role includes ensuring that the Sisters' needs are met, financially and physically, as well as coordinating maintenance both within the property and in the surrounding grounds.

1.5 This audit seeks to assess the effectiveness of current safeguarding arrangements, by considering practice over the last twelve months. The CSSA has categorised RLGs on a scale from Level 1 (a small community with minimal outreach and no known safeguarding concerns), Level 2 (a medium sized community with some outreach with vulnerable populations and/or providing some diocesan

activities, such as a Parish Priest), to Level 3 (a large community and/or one with significant outreach with vulnerable populations and/or a disproportionately high number of open safeguarding cases). The Sisters of St Joseph of Annecy was assigned to a Level 2 audit.

1.6 The CSSA recognises the rich diversity of the Religious and acknowledges that the Religious Life Groups within any category may vary significantly in terms of size, ministry, and safeguarding practice. Consequently, CSSA analysts may use professional judgement to ensure that Religious Life Groups are graded against the national standards in such a way that reflects their uniqueness.

2. Methodology

2.1 The CSSA analyst initially contacted the Provincial Leader and Safeguarding Lead on 28 November 2025 to advise of their intention to conduct a safeguarding audit during the week of 9 March 2026. A meeting was subsequently arranged for 18 December between the analyst, Provincial Leader and Safeguarding Lead to discuss the audit process more fully, including the practical arrangements. During this meeting, a revised audit date of the week commencing 23 March was agreed, due to an annual event coinciding with the initial date.

2.2 The Sisters of St Joseph of Annecy was requested to complete a Level 2 audit self-assessment tool providing information on their adherence to the eight National Safeguarding Standards and progress in the overall implementation of the standards. The self-assessment was returned on 22 February 2026, a day earlier than the requested submission date, along with supporting evidence, as listed in the Appendix section of this report.

2.3 Information from the self-assessment and supporting evidence provided by Sisters of St Joseph of Annecy was reviewed by the CSSA analyst and assessed against the Level 2 Maturity Matrix to arrive at ratings for each standard and a combined overall grade.

2.4 Audit interviews were undertaken in-person on 23 and 24 March 2026 across three sites, two in Newport and one in New Inn with:

- The Safeguarding Lead
- The Provincial Leader (also Chair of Trustees)
- A Focus Group of four Sisters
- The Administrative Manager
- The Clinical Lead for New Inn
- Trustees

2.5 An online focus group with Safeguarding Sub-Committee members was held on 25 March where three out of four members were in attendance.

2.6 A tour of the premises was facilitated to demonstrate practical safeguarding arrangements, during which the analyst engaged in informal conversations with all Sisters present.

2.7 Liaison has taken place between the analyst and the Archdiocese of Cardiff-Menevia and the Religious Life Safeguarding Service (RLSS)¹, regarding the engagement between them and how this meets their expectations for safeguarding.

3. Audit grading

3.1 Practice was assessed against the eight national safeguarding standards adopted by the Catholic Church in England and Wales² and graded in accordance with the CSSA Maturity Matrix for Level 2 RLGs.

¹ The Religious Life Safeguarding Service (RLSS) is an independent team of safeguarding professionals offering safeguarding services to the Religious of the Catholic Church in England and Wales.

² Full details of the eight standards and underpinning sub standards are available here: The Eight National Safeguarding Standards (www.catholicsafeguarding.org.uk)

3.2 Potential audit ratings against each standard, and the final overall ratings, are: Below Basic, Basic, Early Progress, Firm Progress, Results Being Achieved, Comprehensive Assurance and Exemplary.

Overall grading	Comprehensive Assurance
Standard 1 – Safeguarding is embedded in the Church body’s leadership, governance, ministry and culture	Exemplary
Standard 2 – Communicating the Church’s safeguarding message	Comprehensive Assurance
Standard 3 – Engaging with and caring for those who report having been harmed	Comprehensive Assurance
Standard 4 – Effective management of allegations and concerns	Comprehensive Assurance
Standard 5 – Management and support of subjects of allegations and concerns (respondents)	Results Being Achieved
Standard 6 – Robust human resource management	Comprehensive Assurance
Standard 7 – Training and support for safeguarding	Results Being Achieved
Standard 8 – Quality assurance and continuous improvement	Comprehensive Assurance

4. Audit findings against each standard

4.1 Standard 1 Safeguarding is embedded in the Church body's leadership, governance, ministry and culture

Strengths

4.1.1 The Sisters of St Joseph of Annecy has adopted the RLSS template Safeguarding Policy. Its opening statement affirms that they take 'seriously the responsibility of safeguarding all children and adults, starting from the principle that each person has a right to expect the highest level of protection, love, encouragement and respect. It further confirms a commitment to the One Church Approach to safeguarding by implementing the changes needed and ensuring that victims/survivors are responded to promptly and compassionately. The Policy, approved by Trustees in November 2025, sets out its scope, communication plan, training expectations, and clearly defined roles and responsibilities. These include Trustees, the Provincial Leader, the Safeguarding Lead, the Safeguarding Sub-Committee and all other roles. It also outlines the procedures to be followed in the event of a safeguarding concern being raised including the associated recording and storage of safeguarding information. The Policy is reviewed every two years, and the next scheduled review will be November 2027, unless any changes are required prior to that date. It is standard practice for the Safeguarding Lead to issue an accompanying letter to all Community Leaders, outlining any updates and providing clear instructions regarding the displaying of the Policy and its accompanying Policy Summary. The letter also requests that the updated Policy is brought to the attention of all Sisters within each community to be read collectively, with the reminder that safeguarding is the responsibility of every Sister.

4.1.2 A Commitment Statement has also been produced, outlining the Sisters of St Joseph of Annecy's commitment to safeguarding. The statement includes key messages that mirror those set out in the Safeguarding Policy and Policy Summary, including the recognition of the role that everyone is required to play in safeguarding children and adults, and an openness to input on how to meet their

needs safely and respectfully. The Commitment Statement, alongside the Safeguarding Policy, and Policy Summary is clearly displayed in each community, as seen by the analyst.

4.1.3 The Provincial Leader described how she promotes a culture of safeguarding by modelling vigilance, openness and accountability in everyday practice. She emphasised that safeguarding is not something that can be set aside, but must remain a constant priority, fully embedded in all aspects of community life. She referred to a Province gathering for all Sisters, held the weekend prior to the audit, where safeguarding discussions and updates were provided. During these discussions, it was reinforced that safeguarding requires continual attention. The Provincial Leader reminded everyone of the need to stay alert and shared an example of a safeguarding situation that required reporting, highlighting the importance of taking responsibility and the need to take prompt and appropriate action when concerns arise.

4.1.4 There is a clear understanding of the importance of creating and maintaining safe environments for Sisters, employees and those encountered through outward-facing ministry. Sisters spoken to informally during the analyst's community visits consistently reported that they feel safe and well cared for, and demonstrated a strong awareness of safeguarding. For many, this awareness comes from their professional backgrounds with the majority having previously worked in health and education sectors. Sisters present in the focus group provided practical examples of how they create safe environments within their areas of ministry. These include being open and transparent about confidentiality, including clear communication around the circumstances of when it cannot be maintained, ensuring that safeguarding policies are readily available and accessible, and adhering to established procedures such as the Residing Alone and Lone Working policies. In addition, Sisters described a range of practical safety measures in place to protect themselves and others while carrying out their ministry with, or on behalf of, the Archdiocese. These include conducting visits in pairs, where appropriate, and operating within physical safeguarding arrangements established by the Archdiocese, such as the installation of cameras in communal areas where visitors are received. Collectively this practice demonstrates not only a strong awareness

of safeguarding responsibilities but also a proactive and consistent commitment to embedding safe environments in all aspects of ministry and daily living.

4.1.5 Following a recent incident involving a Sister, Trustees demonstrated a responsive and proactive approach by immediately implementing enhanced communication protocols and procedures for all Sisters when accessing their local communities. These measures were promptly introduced to strengthen safety arrangements and ensure that, in the event of an emergency, accurate and timely information regarding Sisters' emergency contacts can be easily accessed by emergency services. Sisters were individually supported to understand and implement these new requirements through a range of approaches, including one-to-one guidance, step by step visual aids, and clear written instructions via email. This demonstrates the Trustees' commitment to safeguarding, their duty of care of Sisters, and continuous improvement, as well as their ability to respond swiftly to identified risks. It also reflects clear communication and a person-centred approach that ensures all Sisters are supported to engage confidently with procedures that contribute to their safety.

4.1.6 The Sisters of St Joseph of Annecy is a registered charity³, set up to support the religious and other charitable works undertaken by the English province of the Congregation and its members. There are six Trustees, all of whom are religious Sisters, who meet every month. Safeguarding is a standing agenda item, and the Safeguarding Lead provides reports to the board in advance, enabling them to have informed oversight and decision-making. These reports include standard items, such as DBS⁴ checks and compliance, training, communications, and updates on the Safeguarding Implementation Plan, Integrity in Ministry⁵ promotion,

³ Sisters of Saint Joseph of Annecy CIO, charity number 1214227.

⁴ The Disclosure and Barring Service (DBS) processes and issues criminal record checks on individuals applying for employment or a voluntary role.

⁵ Integrity in Ministry is a code of conduct for Religious engaged in ministry in the Catholic Church in England and Wales. It has been written for the guidance of those in ministry and for the information of those people with and among whom Religious exercise their ministry.

the safeguarding 'red file' (see paragraph 4.2.3 below), and Safe Spaces⁶, as required. The safeguarding Trustee is also a member of the Safeguarding Sub-Committee. Together, she and the Safeguarding Lead ensure that there is a clear, consistent and timely flow of information between the Sub-Committee and the board. All Trustees have undertaken bespoke Trustee training with RLSS; they understand their responsibilities for safeguarding and described the procedures that would be followed in the event of making the decision as to whether a serious incident report would need to be submitted to the Charity Commission. While experienced in submitting serious incident reports for non-safeguarding matters, they stated that if a meeting was not imminent, an extraordinary meeting would be convened, during which all Trustees would collectively make the decision.

4.1.7 The Safeguarding Sub-Committee comprises four members as per the current Terms of Reference, with an equal balance of two religious members and two lay members. The two lay members were appropriately selected based on their professional backgrounds and safeguarding experience. One is a GP and current Chair of a diocesan Safeguarding Sub-Committee. The other is a counsellor, employed by one of the largest bereavement charities in the UK who previously held the role of Parish Safeguarding Representative (PSR)⁷ for 13 years. Trustees delegate the Safeguarding Sub-Committee strategic oversight of safeguarding across the province, including monitoring compliance with policies and procedures, overseeing implementation planning and training, maintaining the risk register, and ensuring appropriate responses to safeguarding incidents, including support for victims and survivors. Sub-Committee members present in their focus group stated that the current membership is proportionate to the present demands and responsibilities of the Sub-Committee. Any future decision to increase lay membership would depend on the nature of any safeguarding concerns being raised and the expertise required. It was noted that, should this be

⁶ Safe Spaces is a free and independent support service, providing a confidential, personal, and safe space for anyone who has been abused by someone in the Church or as a result of their relationship with the Church of England, the Catholic Church in England and Wales or the Church in Wales.

⁷ A Parish Safeguarding Representative (PSR) is a volunteer who supports their parish in safeguarding matters such as safer recruitment of volunteers and liaison with diocesan safeguarding teams.

the case, consideration would be given to recruiting a representative from a statutory authority, for example, the Police.

4.1.8 A Safeguarding Implementation Plan was first created in 2024, and has been subject to routine review, with oversight provided by members of the Sub-Committee and Trustees. Evidence was seen of Implementation Plans being updated over time. Earlier versions focus on DBS checks, training, quality assurance processes, and policy development, as well as identifying who is responsible for completing actions. Further development of these plans is evident in the inclusion of timescales, as was advised by RLSS, upon their review of the plan. While the current headings are aligned to levels of priority (eg 'main priorities', 'important'), further improvements could be achieved by aligning each action to the relevant safeguarding standard. This would enable Sub-Committee members to easily determine where the Safeguarding Lead's time and effort should be directed, in line with the priority of actions and timescales for their completion.

4.1.9 The Sisters of St Joseph of Annecy appointed a Sister to the role of Safeguarding Lead on a full-time basis as of February 2025. Prior to this, she held the role on a part-time basis for seven years while combining it with other responsibilities. Her professional background is in Catholic primary education, where she taught for twenty years before taking up various roles within the Archdiocese of Cardiff. She has undertaken extensive and relevant training (covered in Standard 7), which combined with her professional experience ensures she is well qualified and fully prepared to fulfil her safeguarding responsibilities.

4.1.10 Sisters present in the focus group described leadership in relation to safeguarding as being provided by both the Provincial Leader and the Safeguarding Lead. They reported that safeguarding is communicated regularly through a variety of channels, with frequent updates that they value and appreciate. Sisters expressed that they feel very well supported by the Safeguarding Lead, recognising her as making a significant contribution to safeguarding and ensuring it remains a priority within the province.

4.1.11 There is a strong culture of safeguarding among employees as well as Sisters, underpinned by a shared commitment to care, dignity and protection. This culture

extends beyond safer recruitment processes and encompasses ongoing training, development and support of staff, as well as a sustained commitment to meeting the changing needs of Sisters. Robust processes are in place for the recruitment and selection of employees, ensuring that individuals are not only suitably qualified but are also well prepared for their safeguarding responsibilities. There are 37 employees across the province, working in a variety of roles ranging from qualified nursing staff providing care to Sisters at New Inn, to domestic and maintenance staff whom Sisters encounter in their day to day lives.

4.1.12 Sisters with care and support needs live at New Inn where the accommodation is arranged across three floors. Sisters are supported according to their levels of independence and care needs, for example, those who remain mostly independent reside on the third floor, and those requiring some assistance with activities of daily living are accommodated on the middle floor, where care support can be increased as needed. Sisters with higher needs, including mobility difficulties, are supported on the ground floor. There is sufficient provision for Sisters to move floors, in response to changes in need. Arrangements are in place for assessing, monitoring and reviewing care. This includes routine clinical observations, regular weight monitoring, skin integrity assessments and where required diet and fluid charts. Risk assessments are used to identify and respond to any concerns around nutrition, hydration, pressure care and falls, and are used to inform care planning. Any identified changes in a Sister's presentation are acted upon, and escalated, where necessary, to the relevant health professionals for their intervention and treatment.

4.1.13 A safeguarding specific risk register has been created to identify and assess risks relating to children, vulnerable adults and Sisters. It includes risk impact, ratings, existing controls, and planned actions. Although this was only implemented in December 2025, minutes from Safeguarding Sub-Committee meetings indicate that these risks had already been considered, alongside those identified by Trustees within their existing risk register. New risks have also been identified, including those relating to contingency planning for the absence of the Safeguarding Lead and risks associated with Sisters residing alone. While mitigating measures have been considered and addressed for both these, they have not yet

been formally recorded in the safeguarding risk register. Members of the Sub-Committee spoken to as part of the audit, acknowledged that the register is a working document that will be subject to regular review. It is intended that Trustees will review the current version and provide feedback as part of the documented formal review cycle.

4.1.14 The Integrity in Ministry standards have been consistently promoted among Sisters through email and the distribution of hard copies. The Safeguarding Trustee has also conducted in-person visits to each community between December 2024 and June 2025 to discuss the standards. During these meetings, Sisters were requested to share their commitment to the principles outlined in the document, how these support the development of healthy and positive relationships within their communities and with those they serve, and their personal reflections on key points of significance. Feedback sheets were reviewed by the analyst, and evidence was seen of the Safeguarding Lead following this up with a reminder to Sisters of the importance of sharing good practice and learning from each other. Additional evidence was seen of further communication, in November 2025, confirming that feedback had been compiled into a booklet and shared with all communities, encouraging Sisters to revisit their reflections and recognise safeguarding as part of their daily life. Sisters present during the focus group expressed an appreciation for the document and its accessibility within the safeguarding red file. They described the standards as a helpful reminder of the need to maintain boundaries, while also providing reassurance and confidence that they have acted appropriately. This demonstrates that the Integrity in Ministry standards are being embedded across the Sisters of St Joseph of Annecy's practice.

4.1.15 The Sisters of St Joseph of Annecy is a member of RLSS, who describe their engagement as proactive, seeking routine advice to strengthen their safeguarding practice. For example, they have requested reviews of key documents including the Safeguarding Policy, the Safeguarding Implementation Plan and the Safeguarding Sub-Committee Terms of Reference. Evidence demonstrates that the advice provided has been implemented in practice. There is further clear evidence of engagement with CSSA (outside the scope of the audit) where the Quality Assurance team was approached for support in developing a communication plan.

The guidance offered was acted upon and directly informed the creation of this plan, which will be discussed in the next Standard. This demonstrates a consistent and effective commitment to engaging safeguarding support and embedding recommended improvements in practice.

Areas for development

4.1.16 The identified outstanding risks should be added to the risk register, so that they are formally documented and regularly monitored and reviewed alongside other risks.

Graded: Exemplary

4.2 Standard 2 Communicating the Church's safeguarding message

Strengths

4.2.1 As referenced in Standard one, the Sisters of St Joseph of Annecy has developed a Communication Plan that is incorporated into section two of their Safeguarding Policy and made public via the Congregation Website - English Province page⁸. It applies to all within the province, religious, lay, voluntary or employee, regardless of the roles they undertake. The Communication Plan includes how safeguarding messages are communicated and through which means eg training, discussion at leadership level, through feedback at annual province days, by emails, circulation of external (RLSS) newsletters and by displaying contact information posters and the policy, both the full and summary, in each community.

4.2.2 The Communication Plan was incorporated into the Safeguarding Policy in 2024 and reviewed in 2025, when it was approved by the Safeguarding Sub-

⁸ [Sisters of St Joseph of Annecy Safeguarding page](#)

Committee and Trustees, in line with the policy's review schedule. The next review is scheduled for November 2027, unless amendments are required sooner.

4.2.3 The analyst observed that safeguarding noticeboards are displayed in each community, all consistent in their content and accessible to all Sisters and employees. Each noticeboard includes the Safeguarding Policy and Policy Summary, contact details for the Safeguarding Lead and RLSS, a range of RLSS leaflets, CSSA information, guidance on the 5 Rs of Safeguarding⁹, the Commitment Statement, and details of Safe Spaces. In addition, each community has a safeguarding red file containing these documents, safeguarding communications, contact details of key personnel (both religious and lay), guidance on maintaining safe yet caring boundaries, the eight national safeguarding standards, and other associated policies. Sisters reported that this folder is particularly helpful, as it allows them to take information away and review as needed.

4.2.4 The Sisters of St Joseph of Annecy (English Province) does not have its own website; however, the English province has its own page on the international congregation's website, and a link to the Safeguarding Policy is the first one to be provided. Included under the 'Practice Guidance' section of the policy is information on local and national support services, should anyone wish to access them independently.

4.2.5 Those in leadership roles reported that, given the average age of Sisters is 78, there is a recognised need for flexibility in how information is communicated. As a consequence, updates are delivered through a range of methods, including verbal briefings by Community Leaders, email, newsletters and inclusion in the safeguarding red file. This approach demonstrates a clear understanding of the importance of ensuring that key messages are consistently communicated in accessible and understood formats. It also reflects a commitment to adapting communication methods to meet individual needs and ensuring that safeguarding information is both received and understood by Sisters.

⁹ Recognise, Respond, Report, Record, Refer.

4.2.6 The Safeguarding Lead has attended several workshops, including one (while outside the scope of the audit) that focussed on the use of social media. This session was described as particularly insightful, prompting further promotion of RLSS's leaflets on social media. Subsequent discussions have since been held around the need to develop a bespoke Social Media Policy. The purpose of this policy will be to ensure the safeguarding of Sisters in their use of any social media platform, as well as to safeguard those they may engage with. It was acknowledged during the audit that fully understanding the reach and impact of social media can be challenging.

4.2.7 The Sisters of St Joseph of Annecy has established strong links with a wide range of Church bodies, external agencies and advisory services, supporting the promotion of a safe environment. Collaboration with Torfaen Council and Aneurin Bevan University Health Board ensures access to advice, guidance, oversight and timely intervention when required (particularly for Sisters with care and support needs). HR advisers, such as Croner provide leaders with support regarding staff welfare and employment processes, while engagement with professional networks, including the Nursing and Midwifery Council (NMC), promotes continuous professional development and the sharing of best practice, which is then cascaded to staff by the Clinical Lead. Links with the Archdiocese of Cardiff-Menevia, other religious life groups for canon law expertise and RLSS ensure that safeguarding practices remain up to date and consistently applied. The Administrative Manager and Clinical Lead work collaboratively to maintain such partnerships, enabling access to advice, consultation and resources across safeguarding, human resources, training, health and safety and the ongoing care of Sisters. Strong links are also maintained with the Safeguarding Lead in relation to safer recruitment. Together, these partnerships enable informed and accountable decision-making and reinforce a proactive safeguarding culture. The analyst was informed by Trustees that their approach to safeguarding has been recognised by the Superior General, who intends to seek their advice and guidance due to the advancement of their arrangements compared with other provinces worldwide.

Areas for development

4.2.8 Safeguarding communication is a significant strength, as evidenced throughout the audit and consistently reflected across each community. However, the Communication Plan would benefit from further development. This should include a more clearly defined target audience, explicit safeguarding messages, and clarity regarding roles and responsibilities for those delivering communications, both internally and externally. This should extend beyond the Safeguarding Lead to include the Clinical Lead and Administrative Manager, to recognise their roles in supporting and reinforcing safeguarding messages to their respective teams. Strengthening monitoring and evaluation processes would provide greater assurance that communications are understood and accessible. This could include the use of surveys or questionnaires for Sisters, employees and those to whom Sisters provide outward-facing ministry, alongside consideration of accessibility needs such as larger print and a range of communication formats.

4.2.9 To support the development of the Social Media Policy, the initial step will be to identify which platforms are currently being used, the purposes for which they are used, and what immediate safeguards are required. These measures should support both the Sisters and any individuals who may initiate contact for safeguarding related reasons. This information can then be used to inform the development of the policy accordingly.

Graded: Comprehensive Assurance

4.3 Standard 3 Engaging with and caring for those who report having been harmed

Strengths

4.3.1 The Sisters of St Joseph of Annecy has not had any recent experience of engaging with and caring for individuals who report having been harmed, therefore, assessment against this standard is based on a review of existing

policies, procedures, and the Sisters' readiness to respond to such situations if they arise.

4.3.2 The Safeguarding Policy applies to all within the Province, regardless of their role or the activities they undertake. In the 'Roles and Responsibilities' section, it states that the Sisters of St Joseph of Annecy Council/Trustee Board has a duty to maintain appropriate governance and oversight of safeguarding, including any related due diligence checks. Certain functions are delegated to the Safeguarding Sub-Committee whose members oversee the policy and guidance, manage documentation, case progression, and ensure the secure, legally compliant storage of safeguarding reports. While some responsibilities may be passed to RLSS, the Safeguarding Sub-Committee remains the key point of contact for the case duration unless another individual is identified to assume case responsibility. In the 'Procedure' section of the policy, the core principles are described; 'listen', 'record', and 'report'. It further states that anyone who becomes aware of a safeguarding issue should listen carefully, without asking further questions or investigating. The policy sets out who to contact and who is responsible for informing the individual of next steps, including processes, options, timescales and available support services.

4.3.3 Sisters present in the focus group reported being confident in handling disclosures and engaging with individuals reporting harm. Several have direct experience of receiving disclosures (outside the scope of the audit) and understand onward reporting processes, including a case of spiritual abuse that was appropriately reported. They demonstrated a clear understanding of the need to inform the Safeguarding Lead and to communicate openly with individuals, particularly those who are vulnerable, about the actions being taken. This includes appropriate signposting to services such as Safe Spaces. Sisters were clear about reporting pathways, including when to report concerns through diocesan processes, particularly for those working in parishes. One example provided demonstrated the sensitive handling of a disclosure, in which a Sister explained to the individual of the need to report to diocesan clergy, record the details, and escalate to the Police. This demonstrates a clear understanding of safeguarding

responsibilities, reporting expectations, and the importance of timely action, while balancing pastoral support and ensuring effective risk management.

4.3.4 Training records maintained by the Safeguarding Lead, alongside certificates seen by the analyst, demonstrate that Sisters have undertaken a broad range of safeguarding related training. As previously described in Standard One, the Safeguarding Lead has attended 'Working with Survivors' training with RLSS and explained that, in practice, she would ensure that anyone coming forward to report harm is listened to and provided with a caring and compassionate response. Individuals would be offered the support of a person of their choice, as well as access to counselling services if required. Sisters present in the focus group recalled key messages from their training, including the '5 R's, which are prominently displayed on noticeboards across each community. They described these to be both useful and supportive tools that help guide their responses in safeguarding situations.

4.3.5 While the Sisters of St Joseph of Annecy has not had any recent experience of engaging with individuals who have reported harm, members recognise the importance of learning from their experiences. They see this as an opportunity to establish whether the individual has been appropriately supported and to identify areas where improvements to future practice can be made. In the event of someone coming forward, the Safeguarding Lead will provide members of the Safeguarding Sub-Committee with an overview of the response to the individual, with the aim of identifying opportunities for any learning that will be used to strengthen policies and procedures and enhance standards of practice. This approach is consistent with the Safeguarding Sub-Committee's Terms of Reference. Within its 'Duties and Responsibilities' section, members are tasked with *'providing strategic oversight for all aspects of safeguarding work and ensure the Province's safeguarding policies and procedures are up to date and fully effective in helping people from potential or actual harm.'* They are also responsible for *'advising the Trustees/Council on a strategy for prioritising the support of victims and survivors, and all those affected by concerns and allegations.'*

4.3.6 The Provincial Leader has not had any previous experience of engaging with anyone who has reported harm, however, she advised the analyst that she would listen attentively and ensure that confidentiality is maintained, unless a risk of harm was identified, necessitating reporting to social care or the Police. She also reflected on the impact of a safeguarding workshop attended in January 2026, delivered by Fr Hans Zollner¹⁰, a psychologist, licenced psychotherapist, and a Director at the Pontifical Gregorian University in Rome. Additionally, she demonstrated an awareness of the support services available, for example, Safe Spaces and Towards Healing¹¹.

4.3.7 Evidence was seen that demonstrates that the National Day of Prayer for Survivors of Abuse¹² is promoted among all Sisters, by the Safeguarding Lead, along with an accompanying dedicated prayer. The Provincial Leader informed the analyst that she is considering holding an event on this day, this coming year, by way of offering survivors the opportunity to come forward and seek support. Holding a public event will provide a clear message to survivors that their experiences are acknowledged, they will be taken seriously, engaged with and supported.

Areas for development

4.3.8 The Sisters of St Joseph of Annecy is well prepared to respond to anyone who should come forward and have demonstrated a clear commitment to learning from these experiences. Consideration should now be given to establishing a formal mechanism for gathering feedback, this could include surveys or interviews, or any other means that individuals feel comfortable with. This will support continuous improvement and help ensure that Sisters remain equipped to respond effectively to future needs.

¹⁰ Fr Hans Zollner was one of the original eight members of the Pontifical Commission for the Protection of the Minors established by Pope Francos in 2014.

¹¹ [Towards Healing](#) – an independent organisation in Ireland that provides free, confidential, and professional support to survivors of institutional, clerical, or religious abuse.

¹² [Prayer for Survivors of Abuse – Catholic Bishops' Conference](#)

4.3.9 As discussed in Standard Two, there is the intention to develop a Social Media Policy. When doing so, careful consideration should be given to how potential survivors will be responded to if they make contact via any social media platform. This should include clear guidance on appropriate, sensitive, and trauma-informed responses, as well as signposting to relevant support services. In addition, the National Day of Prayer for Survivors could be actively promoted across social media channels to ensure as wide a reach and awareness as possible, to encourage engagement.

Graded: Comprehensive Assurance

4.4 Standard 4 Effective management of allegations and concerns

Strengths

4.4.1 At the time of the audit, no safeguarding allegations or concerns had been raised within the last 12 months, therefore, an assessment against this standard is based on a review of existing policies and procedures, as well as the Sisters' readiness to respond appropriately should any arise. The Safeguarding Policy clearly states that action must be taken when a concern is raised that a child or adult may be at risk of significant harm, including risks from themselves or others, where there are concerns about mental capacity, or potential harm to others. It also requires mandatory reporting where there are reasonable grounds to suspect that someone in a Church role has committed, may commit, or poses a risk of harm, or is otherwise unsuitable for public facing duties. The procedures outline the steps to be taken should anyone become aware of a concern and reinforces the importance of listening without questioning, recording the information accurately, and reporting it immediately to the Safeguarding Lead or Provincial Leader, or the Administrative Manager or Clinical Lead (if received by an employee). The next steps are for the concern to be referred to RLSS, while ensuring that the individual is informed of next steps, including any contact with relevant authorities and the

associated timescale, (in line with best practice). The policy clearly acknowledges the roles of lay managers within the reporting structure and escalation pathways, which is important given that the procedures apply equally to employees as they do to Sisters. The Employee Handbook also reinforces this, in the 'Safeguarding' section, where details can be found on who the policy is designed to safeguard, and its role in supporting staff in identifying and responding to abuse, procedures and helping to avoid situations that could lead to harm or allegations.

4.4.2 Safeguarding records are retained by the Safeguarding Lead and stored securely in a locked cabinet, in line with General Data Protection Regulations (GDPR)¹³. Further detail is provided in the Safeguarding Policy, under the 'Recording and Storage of Safeguarding Concerns and Case Files' section which outlines the nature of safeguarding information that is recorded. The policy also recognises that safeguarding records may be used as evidence in criminal proceedings, civil cases, or statutory/public inquiries and that records must be stored in a format that ensures they can be easily retrieved and that a clear, auditable record of their provenance and integrity is maintained.

4.4.3 All individuals spoken to as part of the audit demonstrated a clear understanding of internal reporting procedures. This is attributed to the level of contact maintained across the communities and safeguarding messages communicated by the Provincial Leader, Safeguarding Lead, Safeguarding Trustee and two additional Trustees, who hold line management responsibility for the lay managers. Trustees understand the importance of responding to allegations and concerns in a manner that is compassionate, timely and proportionate. They would have oversight of allegations and concerns to ensure that Canon Law is adhered to, while the Safeguarding Sub-Committee oversee the practical handling of such matters and the identification of any learning. In relation to external reporting, Trustees understand their responsibilities in the event of a serious incident requiring

¹³ The General Data Protection Regulations (GDPR) are the UK's data privacy laws that have been in effect since May 2018.

formal reporting, where a report would be submitted to the Charity Commission. RLSS and the CSSA would also be informed as appropriate.

4.4.4 The Sisters of St Joseph of Annecy acknowledges the impact of a disclosure on the individual making it and the individual receiving it and the importance of providing appropriate support to both parties. In practice, RLSS would be contacted to assist in developing support plans, and any therapeutic services would be sourced from the most appropriate provider. For employees, this would typically be accessed through the Employee Assistance Programme, while Sisters may seek support from a provider/support person of their choice. The analyst also heard from one Sister that she receives regular supervision due to the nature of her ministry across different denominations.

Areas for development

4.4.5 Members of the Safeguarding Sub-Committee have recognised the need to enhance leadership awareness of low-level concerns and to develop a policy outlining how such concerns will be addressed. This is in recognition that, if not addressed, low-level concerns may escalate into more serious issues. Although the policy is not yet developed, there is a clear commitment to strengthening oversight of low-level concerns, increasing awareness and establishing processes that ensure effective monitoring of and responses to such concerns. Minutes from the meeting held in February 2026 note that while this needs to be progressed, it is important to acknowledge that introducing too many policies may risk overwhelming Sisters. Consideration should, therefore, be given to incorporating guidance on low-level concerns within the Practice Guidance or another suitable section of the existing Safeguarding Policy, rather than creating a separate standalone document.

4.4.6 While the Safeguarding Policy provides detail on the recording and storage of safeguarding concerns and case files, it does not include information that would be typically found in a Privacy Notice. To ensure transparency, the Sisters of St Joseph should provide additional detail to inform individuals receiving safeguarding services about the lawful basis for processing their information, the types of information that will be retained and their rights. It should include the right

to withdraw consent and guidance on how to submit a subject access request. This is important in ensuring individuals understand how their personal data is collected, used and protected. This information could be incorporated into the Safeguarding Policy to ensure it is easily accessible.

Graded: Comprehensive Assurance

4.5 Standard 5 Management and support of subjects of allegations and concerns (respondents)

Strengths

4.5.1 As with the two previous Standards, the Sisters of St Joseph of Annecy has not had any recent experience of managing and supporting subjects of allegations and concerns, therefore, assessment against this standard is based on a review of policies, procedures and their capacity to respond should such a situation arise. Under the 'General' section of the 'Roles and Responsibilities' in the Safeguarding Policy, it states that *'everyone involved in the work of the province has a duty to disclose to the Safeguarding Lead, Provincial/Admin Manager any safeguarding concerns that have been raised about them'*. As described in 4.4.1, this includes the action that must be taken if someone poses a risk to themselves or others, including those that have a role within the Church.

4.5.2 The Provincial Leader informed the analyst that, in the event of an allegation or concern being raised against a Sister or an employee, in line with procedure and when appropriate, she would hold a meeting with the individual concerned. A detailed record of their conversation would be maintained, and support would be provided throughout the process until all procedures (canonical or civil) are concluded. She confirmed that there is sufficient resilience within the community to cover any ministry and that Trustees would maintain oversight of these cases. During interview Trustees emphasised their commitment to ensuring that no-one would be abandoned or left unsupported, and as they have a Sister trained in

spiritual accompaniment, her support would be offered, if appropriate. Alternatively, the individual would be supported in identifying a suitable support person of their choosing, from within the community or externally. Every effort would be made to ensure that appropriate support is provided, whether it be with counselling, spiritual or psychological needs. In the event of any Sister needing to be removed from ministry and/or away from their community, alternative accommodation would be sought. Weekly welfare checks would be maintained, by way of seeking assurances that support provided is responsive to individual needs.

4.5.3 The Safeguarding Lead has completed training on Care and Safety Management Plans, with RLSS, therefore is appropriately equipped to understand and participate in situations involving the management and support of a respondent should they arise.

4.5.4 Sisters present in the focus group demonstrated a clear understanding of the procedures that would be followed within their respective ministries or work. They recognised that these processes would be implemented by the diocese, or by the leadership team. They were also aware that they would likely be removed from their roles, that support would be provided by the Safeguarding Lead or Provincial Leader, and that they could request for someone to accompany them to any formal meetings.

4.5.5 In the event that legal advice, canonical or civil is required, there are established links with providers, (including HR services and other religious life groups), whose advice would be sought in the event of receiving any allegations or concerns regarding Sisters and employees. As one of the Sisters is a canon lawyer, her advice may also be sought, where appropriate. Additionally, the Provincial Leader advised the analyst that they have access to a 'facilitator' who could be called upon to support such situations, alongside members of the Safeguarding Sub-Committee, who can offer guidance based on their experience within the archdiocese.

Areas for development

4.5.6 It is positive that Sisters spoken to as part of the audit, expressed confidence that procedures would be followed and that support would be provided to them, irrespective of the nature of their involvement (eg as a potential victim or the person alleged to have caused harm). However, it may be beneficial to develop supplementary guidance, separate from the Safeguarding Policy, outlining the details of who may be involved (both internally and externally), the nature of their responsibilities, and the types of support services that may be provided. This will offer clarity regarding the roles of other organisations/services, beyond the Safeguarding Lead, Provincial Leader and lay managers, as identified by the focus group.

Graded: Results Being Achieved

4.6 Standard 6 Robust human resource management

Strengths

4.6.1 Safer recruitment processes are detailed within the Safeguarding Policy. All employees are subject to a DBS, and appointments are made based on the person's experience, skills and ability to meet the criteria and job specification for the role. Appointments are conditional upon receipt of a satisfactory DBS check and acceptable employment references. On appointment, all employees are provided with relevant policies and procedures, including the Safeguarding Policy, which they are expected to sign to confirm they have been received and understood. Employee records are maintained by the Administrative Manager and the Clinical Lead, according to their respective management responsibilities.

4.6.2 As per the Safeguarding Sub-Committee Terms of Reference, members are responsible for ensuring that vetting and recruitment checks are undertaken. Evidence was seen in minutes from Sub-Committee meetings of updates being provided by the Safeguarding Lead on DBS statuses and in Trustees meeting

minutes of their oversight and decision making. An example of this includes which records need to be retained and the need to seek training for an additional verifier (in the absence of the Safeguarding Lead). This has since been actioned by the Safeguarding Trustee, who is now a second verifier.

4.6.3 The Safeguarding Lead maintains comprehensive records of DBS details, for Sisters and the two lay Safeguarding Sub-Committee members, including issue dates, certificate numbers and renewal dates. This enables her to easily monitor when renewals are due and take the necessary steps to ensure that checks and updates are completed in a timely manner. Evidence demonstrates full compliance for those Sisters requiring DBS checks and where a DBS check is not required, a clear rationale is documented. An example of this includes Sisters who are retired and not engaged in any active ministry. Evidence was also seen of correspondence between the Safeguarding Lead and the Archdiocesan safeguarding team to verify the DBS and training status of visiting clergy to their communities. This demonstrates a proactive and thorough approach to safeguarding and due diligence. Records pertaining to employees are maintained by the Administrative Manager and Clinical Lead, as appropriate to whom they hold line management responsibility for.

4.6.4 The Sisters of St Joseph of Annecy does not currently have any individuals exploring a vocation to religious life and consider it extremely unlikely. The most recent Sister to join the community arrived from their Indian province in 2023. All checks had previously been completed by the outgoing province and a Testimonial of Suitability¹⁴ was provided, confirming that she is of good standing. On arrival, the Sister was subject to an enhanced DBS check and attended subsequent safeguarding and formation in both Civil and Canon Law.

4.6.5 The Employee Handbook does not have a separate complaints section, however, it does outline the procedures to follow when making an informal or

¹⁴ A Testimonial of Suitability confirms that the seminarian is in good standing, and that there are no concerns, allegations or criminal convictions (eg relating to any misconduct with children or vulnerable adults).

formal complaint in relation to the storage and handling of disclosure information, as well as in cases where an individual is a victim of alleged harassment, bullying, or sexual harassment. It also details grievances procedures, with an emphasis on the support available throughout these processes, including access to the Employee Assistance Programme.

4.6.6 A Complaints and Disputes Procedure developed in October 2025 has been created on the basis that disagreements can (and have) occurred between Sisters and those in leadership positions. The 'Introduction' section affirms that it is a means of assuring each Sister that she has every opportunity to express her concerns, with the assurance that they will always be given serious consideration. The document references key sources of information, such as the Constitutions, Legal Directory, Statutes and Canon Law, before outlining the practical procedures for any Sister wishing to raise a complaint. As a final recourse (for either party), the procedure states that advice can be sought from 'the diocesan vicar for religious and/or the local Bishop/Archbishop.' There is an emphasis on confidentiality being maintained throughout the process.

4.6.7 Both the Safeguarding Policy and Employee Handbook include a Whistleblowing section which encourages individuals to raise concerns without fear of victimisation or disadvantage. The Safeguarding Policy states that RLSS should be made aware of any malpractice, illegal acts, or omissions within the province, specifically in relation to safeguarding. They will determine the action to be taken and will be responsible for any investigation and associated actions. These procedures have not been enacted to date; however, they remain in place and are accessible to those who may need them.

Areas for development

4.6.8 The Sisters of St Joseph of Annecy has had experience of responding to a blemished DBS, identified during an employee's recheck. The Administrative Manager met with the individual to discuss the nature and context of the disclosure. As the matter was not related to safeguarding concerns, the individual was able to continue in their role. Under the 'Convictions and Offences' section of the Employee Handbook, it states that employees are required to immediately report any

convictions or offences, including traffic offences. This section, however, would benefit from clearer details of the potential consequences and actions that may follow, in practice. Information is only provided in relation to a failure to undertake a check. It is recommended that this section be reviewed and updated to ensure that there is clarity and transparency regarding the associated processes and possible outcomes. In addition to this, details outlining how a blemished DBS check will be responded to should also be included within the Safeguarding Policy.

4.6.9 While there are set procedures for Sisters and employees to follow when making a complaint, the Safeguarding Policy does not clearly distinguish between safeguarding concerns and complaints about a safeguarding service received. Further clarity regarding the steps to be taken would be helpful to anyone seeking to raise a complaint and should include who to contact, the associated timescales, escalation stages or final recourse available (eg RLSS and CSSA). Adding this to the policy will provide a clear message of commitment to putting things right and learning from any complaints raised.

Graded: Comprehensive Assurance

4.7 Standard 7 Training and support for safeguarding

Strengths

4.7.1 The minimum training expectations are set out in the Safeguarding Policy, according to the various roles across the organisation including Provincial, Safeguarding Lead, Council/Trustee, Bursar, Province Sisters, Clinical staff, and Safeguarding Sub-Committee members. The policy also specifies the required frequency for refresher training. Sisters who are infirm and not in regulated activity are still expected to undertake basic safeguarding training. To support this, accessible training is provided at New Inn. Safeguarding training is actively promoted and prioritised by the Safeguarding Lead and Provincial Leadership team. Details of available courses are provided in each safeguarding red file. Evidence seen demonstrates that the training undertaken by Sisters and

employees exceeds the minimum requirements. Sisters attend a range of role relevant training delivered by various providers¹⁵. The most recent training was provided by RLSS in November 2025 and delivered in-person focussing on bespoke scenario-based content. On completion, Sisters are required to forward training certificates, or where one is not provided, details of the course and training provider, to the Safeguarding Lead. The Safeguarding Lead maintains and updates individual training logs, which enables her to effectively monitor compliance. Evidence was also seen of employees' training records being maintained.

4.7.2 The Safeguarding Lead has undertaken a comprehensive range of safeguarding related training including Designated Safeguarding Lead training, Trustee Training, Safeguarding Sub-Committee training for Safeguarding Leads, Safeguarding Adults, Working with Survivors, EduCare training, Mental Health in Ministry, Spiritual Abuse, Low-Level Concerns and Care and Safety Management Plans. She also regularly attends RLSS conferences (alongside other Sisters and members of the Safeguarding Sub-Committee) and, when there is a choice of workshops available, she selects those that will likely add the most value to her practice. For example, she chose to attend a social media workshop, despite lacking confidence in this area, and having attended, recognised its potential. The learning gained from this workshop should now be used to inform the Social Media Policy, alongside input from one of the lay members of the Safeguarding Sub-Committee who is responsible for her organisation's social media activity. In addition to attending training, the Safeguarding Lead has delivered sessions (outside the timeframe of the audit) to the province in relation to communicating safeguarding message, the Safeguarding Policy, the Implementation Plan and the national safeguarding standards. This demonstrates a strong commitment to ongoing professional development and continuous improvement in safeguarding practice.

4.7.3 Both the Safeguarding Sub-Committee and Trustees maintain oversight of training, supported by routine updates provided by the Safeguarding Lead. To date,

¹⁵ Training providers including Conference of Religious, RLSS, CSSA, the Archdiocese, Carmelite Spirituality Network, Local Education Authority, University of South Wales, Stone King, Buzzacott, iHasco.

there has not been a need to address any failures to meet training expectations. This reflects the prioritisation of training by leaders and the Sisters' own commitment to ongoing learning. Should there be any compliance issues, they would be addressed by the Provincial Leader. Informal discussion with Sisters spoken to as part of the audit shared that they value training as it supports them in remaining up to date and refreshed. It was also noted that some Sisters expressed disappointment that the analyst was not delivering a session as part of the audit. Employees complete their training via iHasco¹⁶. This system's enables the Administrative Manager to monitor completion, including duration, individual scores, and number of attempts taken to pass the module.

4.7.4 Upon completion of safeguarding training, Sisters are expected to provide feedback that evidences their reflections on the course and its key messages. This feedback is documented and retained in the safeguarding red files. The analyst heard an example of where learning from spiritual accompaniment training, attended by the Provincial Leader, prompted a review of existing safeguarding processes for a Sister engaged in ministry providing spiritual accompaniment across different denominations. As a result of the training, gaps in safeguarding arrangements were identified and promptly addressed with a more robust system implemented to ensure the Sister's safety. Evidence was also seen of these processes being shared with the Sister, who promptly confirmed that she has implemented the necessary action. This demonstrates a clear capacity for reflective practice, as well as a responsive approach to strengthening safeguarding measures, when new learning is identified.

Areas for development

4.7.5 The self-assessment states that a formal training needs analysis has not yet been developed, as the Sisters' ministries are increasingly limited due to their age

¹⁶ iHasco is an online training platform that provides businesses with extensive library of accredited courses covering HR, Health and Safety, Mental Health Awareness, Fire Awareness, Equality, Diversity and Inclusion, and more.

profile. One should nevertheless be completed, not least to formally review the training needs of employees.

4.7.6 Feedback received from training demonstrates some reflections on good practice alongside comments on the delivery and format. However, there remains scope to strengthen these processes. It is recommended that a structured questionnaire be introduced to evaluate the quality and impact of training more effectively, as well as to identify any emerging training needs among Sisters. The responses from these should then be used to inform future training provision, to ensure that it is appropriately tailored, relevant, and responsive to needs, while recognising the diversity of ministries and roles undertaken by Sisters.

Graded: Results Being Achieved

4.8 Standard 8 Quality assurance and continuous improvement

Strengths

4.8.1 The Sisters of St Joseph of Annecy acknowledges the important role RLSS play, and there is clear evidence that their feedback is actively considered and used to strengthen practice across the province. This has included reviews of key safeguarding policies and documentation. While outside the scope of the audit, and not deemed a safeguarding concern, RLSS was contacted for advice to ensure effective communication of a situation. This demonstrates a strong commitment to quality assurance and continuous improvement. Furthermore, the Sisters of St Joseph of Annecy seeks guidance in relation to its policies and processes to ensure that its practice remains of a high standard.

4.8.2 A Safeguarding Implementation Plan is in place, and evidence demonstrates that actions are routinely monitored and tracked by members of the Safeguarding Sub-Committee and Trustees. To strengthen the plan further it could be enhanced by aligning actions to each safeguarding standard, clearly identifying the specific action, the action owner and timescales for completion.

4.8.3 While the Sisters of St Joseph of Annecy's experience in engaging with and supporting those who report harm is currently limited, members recognise the importance of ensuring that individuals receive appropriate support. There is also an understanding that learning from these experiences is important in informing and strengthening policy and practice. The analyst heard that there is a commitment to ensuring that any learning identified will be shared widely across each community. This will seek to improve responses to those who report harm, ensuring that they are suitably supported by anyone that they should encounter throughout the Sisters of St Joseph of Annecy.

4.8.4 In the Development Plan section of the self-assessment, and as documented in the minutes from Trustee and Safeguarding Sub-Committee meetings, is the intention to implement the recommendations from this audit within six months of receiving the report. This demonstrates a strong commitment to continuous improvement and a willingness to address any gaps in a timely manner.

Areas for development

4.8.5 An 'End of Year Report' is produced by the Safeguarding Lead for Trustees and provides detail on safeguarding activity, key developments and areas for ongoing improvement. To demonstrate openness and transparency, this report could be made publicly available on the basis that it does not include any confidential and sensitive information. Consideration should be given to sharing it more widely across the province, with the public and other stakeholders (for example, the Archdiocese of Cardiff-Menevia, RLSS, other religious life groups and organisations where links have been established). This could be achieved via the English province section of the website, where the report can be made available alongside a summary of its key messages.

Graded: Comprehensive Assurance

5. Summary of overall findings

5.1 Safeguarding arrangements within the Sisters of St Joseph of Annecy are well established, effectively embedded and consistently evident across leadership, governance and community life. There is clear evidence of a strong safeguarding culture, underpinned by visible and active leadership from the Provincial Leader, Trustees, Safeguarding Sub-Committee and the Safeguarding Lead. Oversight arrangements are robust and safeguarding is appropriately prioritised within governance structures, decision-making processes and day-to-day community practice. Furthermore, engagement with external safeguarding bodies is both proactive and constructive. At the same time, further strengthening could be achieved by refining some aspects of governance documentation, including the risk register and Safeguarding Implementation Plan, to ensure that all identified risks and actions are clearly aligned, consistently recorded and subject to routine review.

5.2 Policies, procedures, communication arrangements and training provision support a clear, confident safeguarding culture across the province. Safeguarding messages are communicated through a range of accessible methods that reflect the needs of an ageing community, contributing to good levels of awareness and understanding among Sisters and employees. Training arrangements are comprehensive and exceed minimum expectations. There remains scope however, to strengthen evaluation and the feedback mechanism, including a more systematic use of structured tools, to provide greater assurance that safeguarding communications and training have the intended impact and remain responsive to emerging needs.

5.3 Although there has been limited recent experience of managing safeguarding allegations or concerns, the Sisters of St Joseph of Annecy demonstrates a strong level of readiness to respond appropriately should such situations arise. Reporting pathways are clearly understood, record-keeping arrangements are secure and well managed, and there is a clear emphasis on responding in a timely, compassionate and transparent manner. Consideration is given to the impact of safeguarding matters on all those involved with appropriate support and oversight

arrangements available to ensure appropriate pastoral responses are maintained alongside effective risk management.

5.4 The areas identified for further development are limited and focus on enhancing clarity, consistency and evaluation, rather than addressing fundamental gaps in practice. These include strengthening documentation, monitoring and feedback mechanisms, and providing additional guidance in specific areas to support continued learning and improvement. Addressing these areas will further consolidate existing practice and support the Sisters of St Joseph of Annecy in sustaining and developing their safeguarding arrangements over time.

6. Recommendations

To support improvement, the following recommendations are made:

Within 3 months

- To ensure that all identified safeguarding risks are formally recorded within the safeguarding risk register and subject to routine monitoring and review.

Within 6 months

- To create a Privacy Notice that includes clear information for those receiving safeguarding services, on the lawful basis for processing data, information retention, individuals' rights and processes for subject access requests.
- To incorporate clear guidance on the recognition, reporting and management of low-level concerns within existing safeguarding documentation to support early identification and proportionate responses.
- Further develop the Communication Plan by clearly defining target audiences, key safeguarding messages, roles and responsibilities for delivery, and methods for monitoring and evaluating understanding and impact.

- Establish a formal mechanism for gathering feedback from individuals who report harm, using methods that prioritise choice, sensitivity and accessibility, to inform learning and continuous improvement.
- Complete a training needs analysis to cover all members and employees.

Within 12 months

- If the Sisters of St. Joseph of Annecy choose to use social media to reach others, they should develop and implement a Social Media Policy that includes clear guidance on safeguarding expectations, appropriate responses to safeguarding-related contact via social media and signposting to support services.
- Develop supplementary guidance outlining roles, responsibilities and support arrangements for those who are the subject of allegations or concerns, to provide greater clarity and consistency in practice.
- Review the Employee Handbook to clarify processes and potential outcomes relating to declarations of convictions or offences, and to clearly distinguish between safeguarding complaints and complaints about a safeguarding service received.
- To include details of how a blemished DBS would be responded to, within the Safeguarding Policy.
- Introduce a structured approach to evaluating safeguarding training and identifying emerging needs, using feedback to inform future training provision and ensure it remains proportionate, relevant and responsive.
- Consider making the annual safeguarding report publicly available, in an appropriate format that does not include sensitive or confidential information, to further demonstrate openness, accountability and commitment to continuous improvement.

7. Arrangements for follow-up

7.1 In line with the audit pathway, having received an overall rating of Comprehensive Assurance, the minimum period for the Sisters of St Joseph of Annecy's next safeguarding audit will be three? years, subject to there being no indications of increased risk.

8. Appendix

Communications to Province
Correspondence with Archdiocese
Correspondence with CSSA
Correspondence with RLSS
DBS records
Employee Handbook
Evidence of general communication
Extracts from Annual Report submitted to Charity Commission
Extracts from Trustee meetings
Feedback on Integrity in Ministry and associated promotion
Feedback on training
Leadership structure chart
Minutes (and agendas) from Safeguarding Sub-Committee meetings
Monthly reports to Council Trustees inc. End of Year Report
Photographs of noticeboards
Risk register (Safeguarding page)
Safeguarding Commitment Statement
Safeguarding Implementation Plan(s)
Safeguarding Policies (Complaints, Residing Alone, Community of Two Sisters)
Training records and accompanying certificates