

CANADIAN
UNITARIAN
COUNCIL



**Report of the Lay Chaplaincy Report
Recommendations (2001) Implementation
Review**

March 2008

CUC Lay Chaplaincy Task Force Report

Table of Contents

EXECUTIVE SUMMARY AND RECOMMENDATIONS	3
Recommendations.....	4
1 Background	5
1.1 History.....	5
1.2 Implementation Review	5
1.3 Review Task Force Process.....	6
2 Implementation of the Requirements	7
2.1 Programme Name.....	7
2.2 Requirements for Appointment.....	7
2.3 Length of Term.....	10
2.4 Contracts	10
2.5 Training Contribution.....	11
3 Implementation of Other Recommendations.....	12
3.1 CUC Lay Chaplaincy Committee.....	12
3.2 Ministers and Lay Chaplaincy.....	13
3.3 Complaint Resolution.....	13
3.4 Types of Ceremonies Performed.....	14
3.5 Role Confusion.....	14
3.6 Guidelines for Number of Lay Chaplains in a Society.....	14
3.7 Allocation of rites.....	14
3.8 Standards of Practice.....	15
3.9 Advertising.....	15
3.10 Training	15
3.11 Lay Chaplain’s Handbook of Resource Material.....	16
APPENDIX 1	17
2001 REPORT SUMMARY OF RECOMMENDATIONS	17
APPENDIX 2	19
2001 Resolution passed at Montreal ACM	19
APPENDIX 3	20
Terms of Reference.....	20
APPENDIX 4	21
Suggested Board Resolution to Implement Montréal Resolution.....	21

CUC Lay Chaplaincy Task Force Report

Executive Summary and Recommendations

The Task Force on Chaplaincy reported with recommendations to the 2001 CUC Annual Meeting. At the same meeting, a resolution was passed to implement five of the recommendations as mandatory. These included: changing the name “chaplain” to “lay chaplain” in English, and "Célébrant/Célébrante" in French; authorizing the CUC board to establish minimum requirements for lay chaplains’ training, performance, evaluation and contracts; limiting the term of a lay chaplain to a maximum of six years; and establishing a “per-rite” fee to fund lay chaplaincy training. The motion passed at the 2001 Annual Meeting required the Board to set certain standards for appointees. The Board has not formally done this, although many of the requirements and recommendations have been implemented by the CUC Lay Chaplaincy Committees (LCCs).

The Implementation Review Task force has found that:

- the programme name change has been widely implemented
- the CUC Lay Chaplaincy Committees have developed and implemented training programmes which have been widely accepted
- it appears about one third of congregations are not completing performance evaluations of lay chaplains
- most congregations have implemented the requirement to have a Congregational Lay Chaplaincy Committee to oversee the programme locally, but some still have not
- the maximum six-year term for lay chaplains has been widely implemented but there are some hold-outs who are still requesting reappointment beyond that
- more than one-third of congregations appear to not have lay chaplains’ contracts on file, and there is no assurance that contracts have been signed by lay chaplains in these congregations
- the per-rite training contribution appears to be working well and generating sufficient revenue to provide a good level of training
- there is a high level of satisfaction in congregations with the work of the CUC Lay Chaplaincy Committees
- since CUC Lay Chaplaincy Committees in effect set administrative policy, there is a need for ongoing legal and programme evaluation review, to assist the Executive Director in overseeing the programme
- most ministers are active in their local, and sometimes neighbouring, lay chaplaincy programme
- most congregations have not formally adopted complaint and dispute resolution procedures

The Task Force would like to acknowledge and thank the congregations, lay chaplains, ministers and others who submitted information to the Task Force. We would particularly like to thank the CUC Lay Chaplaincy Committees who provided ongoing support, with both time and effort, to the Task Force, and who are working hard to implement any requirements and recommendations which have not been implemented to date.

CUC Lay Chaplaincy Task Force Report

Recommendations

- 1: That the CUC board formally implement minimum requirements for lay chaplain support, training, performance and evaluation to be met by the congregation before the CUC submits an application for provincial licensing. (Suggested draft attached as Appendix 4)
- 2: Flowing from Recommendation #1, that the CUC Lay Chaplaincy Committees specify and publish minimum theoretical and practical training to be successfully completed before the CUC submits an application for provincial licensing with exceptions to be allowed only at the discretion of the CUC Lay Chaplaincy Committee effective 2009.
- 3: That congregations be advised that effective 2009, renewals will not be processed unless there is certification that an evaluation has been completed within the previous 6 months for lay chaplains completing their first year and within the previous 24 months for other lay chaplains. The certification will confirm that performance was satisfactory, and that the lay chaplain continues to meet qualification criteria.
- 4: That the resolution of the CUC board (Recommendation #1) include establishment of a Congregational Lay Chaplaincy Committee (or in exceptional cases appointment of a responsible congregational board member) as one of the requirements to be met by the congregation before the CUC submits an application for provincial licensing. This should be fully implemented for all appointments starting in 2009.
- 5: That the CUC Lay Chaplaincy Committees develop and publish a suggested terms of reference for Congregational Lay Chaplaincy Committees.
- 6: (i) The CUC should consider allowing additional appointments in congregations which are experiencing difficulties in recruiting new lay chaplains to replace long-term appointees, with the expectation that once the new appointees are experienced, the long-term lay chaplain will step down. (ii) In addition, congregations with lay chaplains who have served beyond 6 years should seriously consider not renewing these terms with the expectation that, once there is a vacancy, other members will step forward. (iii) At some point, the CUC should cease submitting reappointments in these cases unless there is compelling evidence that all possible steps, including (ii) have been tried.
- 7: That the CUC board establish minimum requirements for lay chaplains' contracts including
 - (i) a statement that the term of appointment is not renewable after 6 years; (ii) a declaration that the lay chaplain will not engage in counselling beyond consulting on rites of passage; and (iii) a statement that the lay chaplain is accountable to the Congregational Lay Chaplaincy Committee or local Board. In addition, all contracts must be signed and submitted to the CUC as part of the appointment process.
- 8: That the Executive Director consider appointing an advisory group to assist in overseeing the lay chaplaincy programme, particularly with respect to policy issues.

CUC Lay Chaplaincy Task Force Report

1 Background

1.1 History

Very soon after the Canadian Unitarian Council (CUC) was founded in 1960, desire for Unitarian rites of passage emerged as a particular need. The few ministers in Canada were busy meeting the needs of their own societies, yet were pressed to serve other fellowships in their districts. The great distances between them meant that a solution was urgent. This led, in 1970, to the decision to develop a programme wherein a society could recommend one of its members to the CUC to be licensed to perform marriages. The CUC arranged for senior ministers across the country to provide a training session for potential candidates. The term 'chaplaincy' was selected to name this new programme. The programme arose in response to specific needs, and has served our congregations well.

The programme grew and developed into a key activity of our movement, and is unique in North America. While congregations are responsible for the appointment of their lay chaplains, eight provinces require that the CUC apply for their legal status to perform marriages. From this stems a potential legal liability of the CUC to ensure appropriate policies and safeguards for the programme are in place. In 1999, after almost 30 years, the CUC Board concluded that the purposes and administration of the programme should be evaluated. The Task Force on Chaplaincy (TFC) was appointed, and reported with recommendations (the Recommendations) (Appendix 1) to the Annual Meeting of the CUC in Montréal in May 2001. At the same meeting, a resolution was passed to implement five of the recommendations as mandatory. These included: changing the name “chaplain” to “lay chaplain” in English, and “Célébrant/Célébrante” in French; authorizing the CUC board to establish minimum requirements for lay chaplains’ training, performance, evaluation and contracts; limiting the term of a lay chaplain to a maximum of six years; and establishing a “per-rite” fee to fund lay chaplaincy training (the Requirements) (Appendix 2).

Today, almost all of our congregations appoint lay chaplains, who conduct over 900 rites of passage each year, a slight decline since 2000. Lay chaplains serve as ambassadors to the community at large by conducting religious rites of passage for people who are not affiliated to a religious denomination, or for couples who are affiliated with two different denominations, or are unable to legally marry in their own country or denomination because they are of the same sex. Lay chaplains have provided invaluable service to our denomination, and continue to fulfill an essential role in our congregations.

1.2 Implementation Review

During the period 2001 to 2006 the CUC and congregations began implementing the Requirements, as well as the Recommendations in the report. In September 2006, the CUC board announced a new task force including representation from UUMOC (Unitarian Universalist Ministers of Canada), the CUC Lay Chaplaincy Committees (LCC), the Canadian UU Lay Chaplains’ Association (CUULCA) and the previous task force, along with a CUC Board liaison. This task force was formally constituted as “The Lay Chaplaincy Report Recommendations (2001) Implementation Review” (the Review Task Force). The Terms of Reference for the Review Task Force were: to provide stakeholders with an opportunity to provide feedback on how the changes are working; to review whether and how each of the recommendations has been implemented; to review ongoing compliance by CUC administration

CUC Lay Chaplaincy Task Force Report

and congregations; to report on measured or perceived impacts of the implementation; and to make recommendations to improve implementation or suggest minor changes to the previous recommendations (Appendix 3).

Members of the Review Task Force were:

John Hopewell, Chair (former Chair of the Task Force on Chaplaincy)
Rev. Debra Faulk (UUMOC)
Joy Silver (CUC LCC-West and CUULCA)
Anne Leslie (CUULCA – resigned April 2007)
Margo Rivera (CUC LCC – East – joined May 2007)
Rev. Katie Stein Sather (CUC Board liaison)
Mary Bennett (CUC Executive Director – ex officio)

1.3 Review Task Force Process

The task force functioned by e-mail with occasional telephone conference calls and an informal face-to-face meeting of those attending the 2007 ACM. Due to a delay in stakeholder groups appointing their nominees, work did not get underway until December, 2006. Initially it was decided to establish a questionnaire for all stakeholders, aimed at determining whether each of the Recommendations was implemented and working as intended. Questions were developed and a conference call held in March 2007. It quickly became apparent that while very good progress had been made in implementing some mandatory recommendations, especially training, others, including evaluation of each lay chaplain by his or her congregation, and the establishment of local supervisory committees, were not yet being monitored by the CUC Lay Chaplaincy Committees. While congregations were required to confirm the existence of a contract for each lay chaplain as part of the appointment and renewal process, copies of the contracts were not sent for review by the CUC Lay Chaplaincy Committees, and there was no assurance that the contracts included the mandatory content. Further, the CUC Lay Chaplaincy Committees did not appear to have approved Terms of Reference.

It was concluded that the review process needed to be slowed down and that the initial focus of the review should be narrowed to the CUC Lay Chaplaincy Committees. The process shifted to one in which the task force worked with the CUC Lay Chaplaincy Committees to modify their current processes. The objective was for the CUC Lay Chaplaincy Committees to know, before they process an appointment, whether the Requirements have been implemented by the congregation. Although the time for reappointments for 2007 had mostly passed, it was agreed that the CUC Lay Chaplaincy Committees would attempt to obtain copies of contracts from congregations so that the level of compliance with the Recommendations concerning contracts could be evaluated. In September 2007 the CUC Lay Chaplaincy Committees implemented a policy of requiring a copy of a contract prior to processing a new appointment.

In October 2007 an electronic survey covering all aspects of the recommendations was e-mailed to the CUC mailing list for lay chaplaincy material, including lay chaplains, congregational lay chaplaincy committee chairs, and Ministers. Responses were requested by January 15, 2008. 134 survey requests were sent out and 83 responses received from individuals in 42

CUC Lay Chaplaincy Task Force Report

congregations and emerging groups – an exceptionally high response rate.* All of the data received from the survey and from the CUC Lay Chaplaincy Committee contract reviews was then analyzed and the conclusions and resulting recommendations can be found below.

2 Implementation of the Requirements

Requirements are outlined in the “Lay Chaplaincy Manual for Congregational Lay Chaplaincy Committees” (the Manual). The CUC Lay Chaplaincy Committees have put a considerable amount of effort into producing and maintaining the Manual which was updated as recently as March 2008 and it is essential for management of the programme locally.

2.1 Programme Name

CUC 2001 Requirement: *The name "chaplain" be replaced with "lay chaplain" in English and "Celebrant/e in French.*

Material produced by the CUC always uses the mandated terms and 87% of respondents to the survey indicated that this was also true of their congregations. Comments from survey respondents indicate changing the spoken terminology may be more of a challenge.

2.2 Requirements for Appointment

CUC 2001 Requirement: *The CUC board establish minimum requirements for [lay] chaplain support, training, performance and evaluation to be met by the congregation before the CUC submits an application for provincial licensing.*

At the same time as the Task Force on Chaplaincy report (TFCR) was presented, the CUC Board was heavily involved in implementing the steps required for the transfer of services from the UUA. As a result, the Board does not appear to have formally established minimum requirements.

Recommendation #1: That the CUC board formally implement minimum requirements for lay chaplain support, training, performance and evaluation to be met by the congregation before the CUC submits an application for provincial licensing.
(Suggested draft attached as Appendix 4)

Despite the lack of formal direction, the CUC Lay Chaplaincy Committees have made significant progress in implementing the requirements approved in Montreal.

2.2.1 Training Requirement

The Manual includes a requirement that prior to appointment, lay chaplains must complete training mandated by the CUC Lay Chaplaincy Committee, but does not specify a curriculum. Specifics relating to the training programme are discussed in Section 3 of this report. In terms of requirements prior to appointment, training programmes have now developed to a point where it should be feasible to establish and publish minimum defined curricula and practical training which must normally be completed before initial appointment. The manual also recommends a

* Full survey responses will be posted on the CUC website at www.cuc.ca/lay_chaplaincy

CUC Lay Chaplaincy Task Force Report

mentoring process with an existing lay chaplain for one year prior to appointment. CUC Lay Chaplaincy Committees do not always require adequate training to have occurred before completing the appointment process, although there is an expectation that this will occur. The training provided is dealt with later in this report.

Recommendation #2: Flowing from Recommendation #1, that the CUC Lay Chaplaincy Committees specify and publish minimum theoretical and practical training to be successfully completed before the CUC submits an application for provincial licensing with exceptions to be allowed only at the discretion of the CUC Lay Chaplaincy Committee effective 2009.

2.2.2 Performance and Evaluation

The Task Force on Chaplaincy Report included recommendations that evaluation of lay chaplains be performed annually by the Congregational Lay Chaplaincy Committee; that the CUC Board establish a standard recommended evaluation process including the factors to be evaluated; and that the CUC Board facilitate the establishment of links between [lay] chaplains and others with rites of passage experience for purposes of peer review and mentorship.

The Manual provides a brief paragraph on evaluation of lay chaplains but does not stress that evaluations are mandatory. The CUC website includes a very detailed model evaluation process which can be adopted as is by a congregation, or modified to meet its particular needs.

Responses to the evaluation section of the survey indicated that 69% of respondents found that the requirement to complete evaluations did not present a problem to their congregation. 31% indicated that their congregation use the recommended process, 33% indicated they use a different process, and 36% indicated they do not complete evaluations. The main reason given for not completing evaluations was that it is difficult since many rites provided by the lay chaplain are not monitored first-hand. In one case, it was indicated that there was no Congregational Lay Chaplaincy Committee or board member to do it. Several respondents suggested that an annual review is too often.

Currently the lay chaplain appointment renewal form requests confirmation that the congregation has evaluated the candidate's performance and the candidate continues to meet qualification criteria according to CUC Lay Chaplaincy Guidelines. This addresses basic qualifications but not performance expectations. Further, if the item was not checked off, indicating that perhaps an evaluation was not done, the CUC Lay Chaplaincy Committee was, until recently, still processing the renewal.

To assist in ensuring consistent evaluations across the country, the CUC Lay Chaplaincy Committees should work to promote the use of the evaluation process on the website. There is already a component on evaluations in the Basics Training Manual to help promote the evaluation as part of the normal routine.

Recommendation #3: That congregations be advised that effective 2009, renewals will not be processed unless there is certification that an evaluation has been completed within the previous 6 months for lay chaplains completing their first year and within the

CUC Lay Chaplaincy Task Force Report

previous 24 months for other lay chaplains. The certification will confirm that performance was satisfactory, and that the lay chaplain continues to meet qualification criteria.

2.2.3 Lay Chaplain Support - Congregational Lay Chaplaincy Committee (CLCC

***CUC 2001 Requirement:** That congregations participating in the [Lay] Chaplaincy programme establish a [congregational lay] chaplaincy committee under terms of reference which include minimum requirements approved by the CUC Board and a clear contract with the Lay Chaplain or Chaplains. The committee will provide a summary report annually through the local Board to the CUC M & CC listing activities, evaluations future training requirements and concerns.*

The Task Force on Chaplaincy Report included this recommendation as “mandatory”. While Congregational Lay Chaplaincy Committees were not specifically included in the Montréal resolution, the intention was that Congregational Lay Chaplaincy Committees would implement and maintain lay chaplaincy support, training, and performance evaluation locally.

Although at the time of the Task Force on Chaplaincy Report the old “CUC Chaplaincy Guidelines” included a “Model Terms of Reference” for Congregational [lay] chaplaincy committees which the Task Force on Chaplaincy Report concluded was appropriate, the Manual today does not provide a comprehensive list of the responsibilities of the Congregational Lay Chaplaincy Committee, nor does it address the assignment of a responsible Board Member in the event a smaller congregation is unable to appoint a Congregational Lay Chaplaincy Committee. This needs to be remedied.

To fulfill its support role, the Congregational Lay Chaplaincy Committee needs good communication with the CUC Lay Chaplaincy Committee, to ensure local training needs are met and to facilitate regional mentoring where this is necessary.

Responses to the section of the survey dealing with Congregational Lay Chaplaincy Committees indicated that 91% of respondents were in congregations with a Congregational Lay Chaplaincy Committee and 3% in congregations with a responsible board member. 85% indicated the requirement to have a Congregational Lay Chaplaincy Committee does not present a challenge to them. Of those who reported a challenge, the main problems appear to be recruiting members, especially in small congregations, and ensuring members are knowledgeable in lay chaplaincy matters. 56% indicated their Minister serves on their Congregational Lay Chaplaincy Committee and 89% indicated there was effective communication between Lay Chaplains, Ministers, the Congregational Lay Chaplaincy Committee and the local Board. It can be concluded that the requirement to have a Congregational Lay Chaplaincy Committee has been widely implemented and appears to be accepted. However, there are still congregations where this is not the case.

Recommendation #4: That the resolution of the CUC board (Recommendation #1) include establishment of a Congregational Lay Chaplaincy Committee (or in exceptional cases appointment of a responsible congregational board member) as one of the requirements to be met by the congregation before the CUC submits an application for

CUC Lay Chaplaincy Task Force Report

provincial licensing. This should be fully implemented for all appointments starting in 2009.

Recommendation #5: That the CUC Lay Chaplaincy Committees develop and publish a suggested terms of reference for Congregational Lay Chaplaincy Committees.

2.3 Length of Term

CUC 2001 Requirement: *[Lay] Chaplains serve a maximum six-year term, affirmed annually by the congregation, which can be extended annually by the CUC Board's [lay] chaplaincy committee if, after a vigorous search, a suitable candidate is not found. Terms of existing [Lay] Chaplains will be deemed to have begun June 1, 2001.*

Based on the Montreal Resolution, all lay chaplains serving in June 2001 should have retired by June 2007. While significant progress has been made in this respect, as at December 2007 there were still at least 14 of these lay chaplains continuing to serve, although most were in places where some new appointments had also been made.

23 % of survey respondents indicated their congregations had lay chaplains who had served for six years or more. Reasons given included the extensive time commitment; dedicated and experienced incumbents who set a standard that others feel they cannot match; not enough suitable people; and a desire to retain the existing long-service lay chaplain. Some successful strategies for recruiting new lay chaplains included having the Congregational Lay Chaplaincy Committee “head-hunt” people they believe to be good candidates, providing plenty of lead time, holding information and training sessions; and recruiting to the Congregational Lay Chaplaincy Committee with the expectation some members will go on to become lay chaplains.

The CUC Lay Chaplaincy Committees have been proactive in implementing this policy. There is no question that the long-term lay chaplains have provided stellar service to their congregations. However, where there is an incumbent who appears to be performing at a level beyond what others feel they could achieve, it seems likely there is an aura around the position which is neither desirable nor realistic. The programme is clearly designed to allow ordinary members of a congregation, who have appropriate skill sets, to experience providing rites of passage, and most congregations find they are able to attract candidates. While the role is indeed unique, it should not be seen as being on a different plane to any other volunteer position in the church community.

Recommendation #6: (i) The CUC should consider allowing additional appointments in congregations which are experiencing difficulties in recruiting new lay chaplains to replace long-term appointees, with the expectation that once the new appointees are experienced, the long-term lay chaplain will step down. (ii) In addition, congregations with lay chaplains who have served beyond 6 years should seriously consider not renewing these terms with the expectation that, once there is a vacancy, other members will step forward. (iii) At some point, the CUC should cease submitting reappointments in these cases unless there is compelling evidence that all possible steps, including (ii) have been tried.

2.4 Contracts

CUC Lay Chaplaincy Task Force Report

CUC 2001 Requirement: The CUC board establish minimum requirements for [lay] chaplains' contracts and that all contracts be signed before the CUC submits an application for provincial licensing.

This requirement needed a resolution by the CUC board setting the minimum requirements. For reasons indicated above, this did not occur. The requirements recommended in the Task Force on Chaplaincy Report were:

- the term of appointment not renewable after 6 years,
- a declaration that the lay chaplain will not engage in counselling beyond consulting on rites of passage
- a statement that the lay chaplain is accountable to the Congregational Lay Chaplaincy Committee or local Board.

The Task Force on Chaplaincy Report included a recommendation that contracts be submitted to the CUC Lay Chaplaincy Committee as part of the appointment process.

The CUC Lay Chaplaincy Committee implemented this requirement by requiring congregations to acknowledge the existence of contracts on the renewal form submitted annually. Starting in 2008, CUC Lay Chaplaincy Committees require contracts to be submitted with new applications. In addition, for 2008 they will require copies of all contracts for renewals if they are not already on file with the CUC. As part of the process of this Task Force, CUC Lay Chaplaincy Committees requested copies of 2007 contracts from congregations and 36 congregations responded including 22 that submitted contracts. 39% indicated they do not have contracts on file. Of the 22 congregations which submitted contracts, all include the three mandatory points recommended above.

The fact that so many congregations do not have signed contracts on file, highlights the need for submitting copies as part of the appointment process. As stated in the Task Force on Chaplaincy Report, there are significant legal risks for the CUC and this needs to be mitigated by having a clear chain of accountability, starting with a signed contract which spells out responsibilities and limitations.

On the positive side, 96% of survey respondents indicated that local training and orientation cover the distinction between counselling and consulting.

Recommendation #7: That the CUC board establish minimum requirements for lay chaplains' contracts including (i) a statement that the term of appointment is not renewable after 6 years; (ii) a declaration that the lay chaplain will not engage in counselling beyond consulting on rites of passage; and (iii) a statement that the lay chaplain is accountable to the Congregational Lay Chaplaincy Committee or local Board. In addition, all contracts must be signed and submitted to the CUC as part of the appointment process.

2.5 Training Contribution

CUC 2001 Requirement: Each congregation contribute a fixed amount from each fee-generating rite of passage conducted by their [lay] chaplains to the CUC Lay Chaplaincy Training Fund; this amount to be determined by the CUC board and may be changed from time

CUC Lay Chaplaincy Task Force Report

to time and the amount received in this way will be used specifically for development of a training programme and to subsidize ongoing training.

The CUC Board passed a resolution at its May 2001 meeting to establish a contribution to the training fund of \$10 per fee-generating rite of passage conducted by a lay chaplain. In 2007, this generated \$9,495. No further action is required at this time beyond a periodic review to confirm that the amount of the assessment is appropriate. The training programme is reviewed below.

3 Implementation of Other Recommendations

N.B. Recommendations from the Task Force on Chaplaincy Report are italicised and numbers refer to the recommendation number in the Task Force on Chaplaincy Report.

3.1 CUC Lay Chaplaincy Committee

3.5 CUC 2001 Recommendation: *That the Ministry and Chaplaincy Committee review its dual role and recommend to the CUC board how the functions could best be split so that [lay] chaplaincy matters are dealt with by a dedicated[lay] chaplaincy committee. The composition and membership of the[Lay] Chaplaincy Committee should include representation from small and large congregations,[lay] chaplains, former[lay] chaplains, ministers, [Congregational Lay] Chaplaincy committees, CAUUC [now: Canadian UU Lay Chaplains Association] and the CUC Board. Regional liaisons should be appointed to assist the committee in its work.*

As recommended in the Task Force on Chaplaincy Report, a dedicated CUC Lay Chaplaincy Committee was established. With the heavy workload associated with implementing the Montreal resolution and report recommendations, and with the need for close liaison with congregations, it became apparent that a more effective model would be to establish two sister committees – one in the East and one in the West – to carry out this work. This was done in 2006. These committees report to the Executive Director. Their main functions are implementing CUC policies and administering appointments of lay chaplains. However, they also have a *de facto* policy development function in producing the Manual, which requires communicating policies which may not have previously been articulated. The Terms of Reference for the Lay Chaplaincy Committees appears in the Manual.

The role of the CUC Lay Chaplaincy Committee(s) is challenging and has grown considerably since 2001. In addition, as identified in the Task Force on Chaplaincy Report, there are legal risks associated with the programme. While good progress has been made in ensuring an adequate chain of accountability and improved standards of training and evaluation since 2001, more work still need to be done. As is common in programme management, the stakeholders immediately involved in the programme are most ready to commit to serving on Congregational Lay Chaplaincy Committees and CUC Lay Chaplaincy Committees, which are charged with governing the programme locally and nationally. However, lay chaplains are deliberately not professionals in the sense that doctors or lawyers are professionals and self-governance is not appropriate. It is sometimes difficult to attract people to Congregational Lay Chaplaincy Committees at the local level. Difficulty in attracting independent people to manage the programme locally is problematic for adequate accountability, so sound policies at the CUC level are essential.

CUC Lay Chaplaincy Task Force Report

The Executive Director is charged with overseeing the entire operation of the CUC. The amount of time available to deal with lay chaplaincy issues is obviously limited. In addition, the issues involved include minimising legal risks and ensuring adequate chains of accountability. It would seem reasonable for the Executive Director to be assisted by an advisory committee with members with legal and programme evaluation expertise to observe the work of the CUC Lay Chaplaincy Committees and advise the Executive Director when policy or administrative changes are required.

The survey asked respondents whether they were satisfied with contact with and support from the CUC Lay Chaplaincy Committee. 79% indicated they were satisfied. Several respondents indicated they had little or no contact with their representative, but since respondents were in various roles, it's possible that contact was through other members of their congregations. One person suggested this structure be used as a model for mentoring other important local committees.

The survey also asked whether respondents were satisfied with lay chaplaincy support, training and communication networks from the CUC. 87% answered yes.

Recommendation #8: That the Executive Director consider appointing an advisory group to assist in overseeing the lay chaplaincy programme, particularly with respect to policy issues.

3.2 Ministers and Lay Chaplaincy

3.7 CUC 2001 Recommendation: *That ministers serve on the local [lay] chaplaincy committee and provide quality assurance, training and advice to chaplains within their own congregations and, where feasible, assist in these roles with [lay] chaplains in neighbouring congregations with no minister.*

The survey asked whether ministers served on the Congregational Lay Chaplaincy Committee. Of those responding from congregations with ministers, 85% indicated that the minister was a committee member. 78% of respondents considered their minister is active in the lay chaplaincy programme. In addition, 75% of respondents from congregations without a minister indicated they were able to get assistance from a neighbouring minister when needed.

3.3 Complaint Resolution

3.9(a) CUC 2001 Recommendation: *That congregations develop complaint and dispute resolution procedures.*

3.9(b) CUC 2001 Recommendation: *That the CUC Board adopt the complaint resolution process in Appendix 6 of this report [TFCR].*

Almost two-thirds of respondents indicated their congregations did not have complaint and dispute resolution procedures, although some of these indicated that, if the need arose, they would use the procedures in the CUC manual. There appears to be a lack of understanding that when the need for a resolution process arises, it is often too late to try to agree on a process to resolve the situation. The Manual includes a suggested process for use by congregations, and congregations should be encouraged to adopt it, or a similar policy for local use. An increased

CUC Lay Chaplaincy Task Force Report

emphasis on complaint and dispute resolution in the training material may be needed. It would be appropriate for congregations to add the process to their “Right Relations” policy.

3.4 Types of Ceremonies Performed

4.3 CUC 2001 Recommendation: *That [lay] chaplains only perform ceremonies which would be considered suitable and permitted on the congregation’s own premises.*

While only 31% of survey respondents indicated their congregations had policies on the types of ceremonies performed, 63% indicated that local training and orientation cover the types of ceremonies that their lay chaplains may perform. While this area does not currently appear to be problematic, training should continue to address the need to avoid publicity-seeking events and stunts.

3.5 Role Confusion

4.4 CUC 2001 Recommendation: *CUC training must ensure [lay] chaplains are able to recognise the risk of role confusion and provide examples and ways for [lay] chaplains to keep their [lay] chaplaincy roles distinct from other roles or tasks they may have in congregations.*

The Manual provides clear examples of the types of role confusion to be avoided. Among those not involved in the lay chaplaincy programme, there continues to be a lack of understanding of the limitations of the role of the lay chaplain. For example, in one congregation a senior board member suggested that lay chaplains take on responsibility for pastoral care in the absence of the Minister. It can no doubt be challenging for Congregational Lay Chaplaincy Committees and lay chaplains to ensure members of their congregations have appropriate expectations of the programme. Training should encourage those involved to emphasise the true role of the lay chaplain in their congregations at every opportunity.

3.6 Guidelines for Number of Lay Chaplains in a Society

5.1 CUC 2001 Recommendation: *That the CUC Board develop specific guidelines which include the number of rites of passage requested, the extent of the territory served, the variety of religions and languages normally dealt with, and the availability of suitable candidates for training as factors to be considered in determining the number of chaplains needed by a particular society*

The CUC Lay Chaplaincy Committees have developed language to address questions around how many lay chaplains a congregation could appoint according to their particular circumstances. Criteria do not yet appear in the Manual.

3.7 Allocation of rites

5.4 CUC 2001 Recommendation: *That congregations have clearly defined policies on allocation of rites between minister and [lay] chaplains and between [lay] chaplains*

50% of respondents to the survey indicated that their congregation has a written policy on allocation of rites between lay chaplains and, where applicable, between lay chaplains and the minister. The CUC Lay Chaplaincy Committees have found that issues do arise in congregations without clear policies and the need for a clear understanding is articulated in the Manual. It is

CUC Lay Chaplaincy Task Force Report

especially important for congregations with new ministers, who may not be familiar with how the programme operates.

3.8 Standards of Practice

5.6 CUC 2001 Recommendation: *That in consultation with the Canadian Association of Unitarian Universalist Chaplains [now Canadian UU Lay Chaplains Association] and other stakeholders, the CUC Board, through the M & CC, develop Standards of Practice for [lay] chaplains to which each [lay] chaplain will be required to subscribe.*

The Task Force on Chaplaincy Report recommended that this recommendation become mandatory. The Manual lists “be willing to adhere to the *Code of Practice* for lay chaplains” as one of the qualifications for lay chaplains. The Code of Practice is published in the Manual and many of the factors in the Code of Practice are included in the model contract recommended to congregations. Only 50% of respondents to the survey indicated that their congregations require lay chaplains to sign standards of practice. It would also be useful to include the Code of Practice in the training manual. In March 2008, conflict of interest guidelines were added to the Manual.

3.9 Advertising

5.9 CUC 2001 Recommendation: *That the CUC Board establish guidelines for appropriate advertising.*

The CUC has developed a brochure and more are in development. In addition, there is an excellent web page on ceremonies, including a contact form. The Manual includes minimal information on advertising and there are no guidelines. 70% of respondents to the survey indicated they include lay chaplaincy information on their websites but only 49% indicated they use pamphlets.

3.10 Training

6.1a CUC 2001 Recommendation: *That the CUC Board develop a more adequate model for training [lay] chaplains and [Congregational Lay] Chaplaincy committees and ensure M & CC training is offered when and where required. Funding to be provided by the CUC and by Congregations.*

The CUC Lay Chaplaincy Committees, supported by ministers and congregation members involved in lay chaplaincy, have invested a great deal of time and effort in developing comprehensive training delivered regionally on a regular basis and paid for by the “per rite” contribution submitted by all congregations. This effort appears to have paid off.

Fully 87% of survey respondents indicated the CUC training meets the needs of their lay chaplains and Congregational Lay Chaplaincy Committees. Most comments were positive. It was pointed out that this type of training needs to be supplemented by local mentoring. There was a suggestion that the CUC develop a catalogue of all training available. It should be noted that there is a listing of all upcoming CUC lay chaplaincy training on the website. There were some concerns about the need to travel to training and the related costs; however, these were few and realistically it is not possible for the CUC to offer local training for all lay chaplains. There were positive comments about teleseminars as a cost-effective alternative.

CUC Lay Chaplaincy Task Force Report

It appears that a high quality of training is being offered, and it may be time to move to the next level by offering a standard curriculum for prospective lay chaplains, in support of Recommendation #2 above.

6.1b CUC 2001 Recommendation . . . *Congregations are encouraged in addition to include funds in their budget specifically designated to send current and potential [lay] chaplains to formal M&CC [Lay Chaplaincy] training workshops and to pay for resource materials.*

Survey respondents were asked whether their congregations provided funding for lay chaplaincy training beyond the “per rite” contribution. 56% indicated that their congregations offer this type of support and 55% indicated their congregations pay travel costs for lay chaplains to attend CUC training.

3.11 Lay Chaplain’s Handbook of Resource Material

6.2 CUC 2001 Recommendation: *That the CUC Board compile a [lay] chaplains’ handbook of resource material including materials in a variety of media. Materials could be received from [lay] chaplains, ministers and the CAUUC [Canadian UU Lay Chaplains Association]. CUC Board would make such a resource available to all congregations.*

The CUC Lay Chaplaincy Committees began this work but found there were problems with copyright issues relating to much of the required material. This project was cancelled and instead a “Wiki” was established. Survey respondents were asked whether the material on the Wiki, e-mail groups and training meet their needs. 51% answered yes. 29% indicated they were not aware of the Wiki pages. The most common comments were that they had difficulty navigating the Wiki and that there was not yet enough material included.

The Wiki appears to be a very promising development and the CUC Lay Chaplaincy Committees should be encouraged to develop it and provide support to users.

CUC Lay Chaplaincy Task Force Report

APPENDIX 1

2001 REPORT SUMMARY OF RECOMMENDATIONS

This summary included all recommendations in the report. Some of these the task force considers mandatory, to be implemented by the CUC as requirements for congregations to participate in the programme. All of these are marked (M) in this summary. Others are recommended practices or guidelines for congregations.

3.4 That the CUC, by vote at an Annual Meeting, authorize the CUC Board to establish minimum requirements for chaplain support, training, performance and evaluation to be met before the CUC submits an application for provincial licensing. (M)

3.5 That the Ministry and Chaplaincy Committee review its dual role and recommend to the CUC board how the functions could best be split so that chaplaincy matters are dealt with by a dedicated chaplaincy committee. The composition and membership of the Chaplaincy Committee should include representation from small and large congregations, chaplains, former chaplains, ministers, Chaplaincy committees, CAUUC and the CUC Board. Regional liaisons should be appointed to assist the committee in its work.

3.6 That congregations participating in the Chaplaincy programme establish a chap-laincy committee under terms of reference which include minimum requirements approved by the CUC Board and a clear contract with the Lay Chaplain or Chaplains. The committee will provide a summary report annually through the local Board to the CUC M & CC listing activities, evaluations future training requirements and concerns. (M)

3.7 That ministers serve on the local chaplaincy committee and provide quality as-surance, training and advice to chaplains within their own congregations and, where feasible, assist in these roles with chaplains in neighbouring congregations with no minister.

3.9(a) That congregations develop complaint and dispute resolution procedures.

3.9(b) That the CUC Board adopt the complaint resolution process in Appendix 6 of this report.

4.1 That the name “Chaplain” be replaced with “Lay Chaplain” in English and “Célébrant/Célébrante” in French. (M)

4.2 That congregations be required by the CUC Board to include in the chaplain’s contract a declaration that they will not engage in counselling beyond consulting on rites of passage. The training programme must cover the distinction between counselling and consulting. (M)

4.3 That chaplains only perform ceremonies which would be considered suitable and permitted on the congregation’s own premises.

4.4 CUC training must ensure chaplains are able to recognise the risk of role confusion and provide examples and ways for chaplains to keep their chaplaincy roles distinct from other roles or tasks they may have in congregations.

5.1 That the CUC Board develop specific guidelines which include the number of rites of passage requested, the extent of the territory served, the variety of religions and languages normally dealt with, and the availability of suitable candidates for training as factors to be considered in determining the number of chaplains needed by a particular society (M).

CUC Lay Chaplaincy Task Force Report

- 5.2 That ministerial students not be appointed as chaplains solely because of their student status. Students currently appointed because of their student status should continue in the role until graduation.
- 5.3 That chaplains serve a six year term, affirmed annually by the congregation. If, following a vigorous search, the chaplaincy committee is unable to find a suitable candidate, a term may be extended annually with the approval of the M & CC. (M)
- 5.4 That congregations have clearly defined policies on allocation of rites between minister and chaplains and between chaplains
- 5.5a That evaluation of chaplains be performed annually by the local chaplaincy committee (M)
- 5.5b That the CUC Board establish a standard recommended evaluation process including the factors to be evaluated (M)
- 5.5c That the CUC Board facilitate the establishment of links between chaplains and others with rites of passage experience for purposes of peer review and mentor-ship, including the links already established by CAUUC
- 5.6 That in consultation with the CAUUC and other stakeholders, the CUC Board, through the M & CC, develop Standards of Practice for chaplains to which each chaplain will be required to subscribe (M)
- 5.7 That the CUC Board establish minimum requirements for chaplains' contracts and all contracts be submitted to the CUC as part of the appointment process (M)
- 5.8 That congregations have clearly defined policies on payment procedures
- 5.9 That the CUC Board establish guidelines for appropriate advertising
- 6.1a That the CUC Board develop a more adequate model for training chaplains and Chaplaincy committees and ensure M & CC training is offered when and where required. Funding to be provided by the CUC and by Congregations.
- 6.1b That each congregation contribute a fixed amount (to be determined by the CUC Board) to the CUC Lay Chaplaincy Training Fund from each fee-generating rite of passage conducted by their chaplains. This money to be used by the M & CC to create a training programme and subsidise ongoing training. Congregations are encouraged in addition to include funds in their budget specifically designated to send current and potential chaplains to formal M&CC training workshops and to pay for resource materials (M)
- 6.2 That the CUC Board compile a chaplains' handbook of resource material including materials in a variety of media. Materials could be received from chaplains, ministers and the CAUUC. CUC Board would make such a resource available to all congregations

CUC Lay Chaplaincy Task Force Report

APPENDIX 2

2001 Resolution passed at Montreal ACM

BE IT RESOLVED THAT:

The CUC AGM accepts the final report of the CTF and thanks them for their work and that consistent with the recommendations marked as mandatory in the task force final report:

1. The name "chaplain" be replaced with "lay chaplain" in English and Célébrant/Célébrante" in French.
2. The CUC board establish minimum requirements for chaplain support, training, performance and evaluation to be met by the congregation before the CUC submits an application for provincial licensing.
3. Chaplains serve a maximum six-year term, affirmed annually by the congregation, which can be extended annually by the CUC Board's chaplaincy committee if, after a vigorous search, a suitable candidate is not found. Terms of existing Chaplains will be deemed to have begun June 1, 2001.
4. The CUC board establish minimum requirements for chaplains' contracts and that all contracts be signed before the CUC submits an application for provincial licensing.
5. Each congregation contribute a fixed amount from each fee-generating rite of passage conducted by their chaplains to the CUC Lay Chaplaincy Training Fund; this amount to be determined by the CUC board and may be changed from time to time and the amount received in this way will be used specifically for development of a training programme and to subsidize ongoing training.

CUC Lay Chaplaincy Task Force Report

APPENDIX 3

Terms of Reference

CANADIAN
UNITARIAN
COUNCIL

CONSEIL
UNITARIEN
DU CANADA

018-1179A King Street West
Toronto, ON, M6K 3C5
416-489-4121 (TEL)
www.cuc.ca · info@cuc.ca
888-568-5723 (TOLL-FREE)



Lay Chaplaincy Report Recommendations (2001) Implementation Review (LCRIR) Task Force

TERMS OF REFERENCE

Task Force Composition

The LCRIR task force will consist of the former chair of the [Lay] Chaplaincy Task Force (Chair), and a representative from each of the UU Ministers of Canada (UUMOC), CUC Lay Chaplaincy Committee (LCC) and the Canadian UU Lay Chaplains' Association (CUULCA).

Mandate

1. Provide all stakeholders with the opportunity to provide feedback on the implementation of the Recommendations. Stakeholders include CUC Board, CUC administration, congregations, lay chaplains, UUMOC, LCC, CUULCA
2. Review whether and how each of the Recommendations has been implemented
3. Review ongoing compliance of CUC administration, congregations and lay chaplains with Recommendations
4. Report on measured or perceived impacts of the implementation
5. Make recommendations to improve implementation or to make minor modifications to the Recommendations.

Approved by the CUC Board of Trustees – September 16, 2006

AFFILIATIONS International Council of Unitarians and Universalists • Unitarian Universalist Association
British General Assembly of Unitarian and Free Christian Churches • International Association for Religious Freedom

CUC Lay Chaplaincy Task Force Report

APPENDIX 4

Suggested Board Resolution to Implement Montréal Resolution

In compliance with the motion passed at the 2001 Annual Meeting, moved that: The Executive Director, through the CUC Lay Chaplaincy Committees (LCC), specify and publish minimum theoretical and practical training to be successfully completed before the CUC submits an application for provincial licensing with exceptions to be allowed only at the discretion of the Lay Chaplaincy Committee, effective 2009.

1. Congregations be advised that effective 2009, renewals will not be processed unless there is certification that an evaluation has been completed within the previous 6 months for lay chaplains completing their first year and within the previous 24 months for other lay chaplains. The certification will confirm that performance was satisfactory, and that the lay chaplain continues to meet qualification criteria.
2. Congregations involved in the Lay Chaplaincy Programme be required to appoint a Congregational Lay Chaplaincy Committee (CLCC) (or in exceptional cases appoint a responsible congregational board member) before the CUC submits an application for provincial licensing. This must be fully implemented for all appointments and renewals starting in 2009.
3. Minimum requirements for lay chaplains' contracts include (i) a statement that the term of appointment is not renewable after 6 years; (ii) a declaration that the lay chaplain will not engage in counselling beyond consulting on rites of passage; and (iii) a statement that the lay chaplain is accountable to the Congregational Lay Chaplaincy Committee or local Board. In addition, all contracts must be signed and submitted to the CUC as part of the appointment process.