

Task Force on Chaplaincy

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TABLE OF CONTENTS

1. APPOINTMENT OF THE TASK FORCE ON CHAPLAINCY.....	3
2 ORIGIN AND PURPOSE OF THE CHAPLAINCY PROGRAM.....	3
2.1 Origin of the Chaplaincy Programme.....	3
2.2 The Canadian Unitarian Council Today.....	3
2.3 Purpose of the Chaplaincy Programme.....	4
2.4 Congregational Polity.....	4
3 GOVERNANCE.....	5
3.1 Mutual Covenant Accountability.....	5
3.2 Legal Issues.....	5
3.3 Mutually Agreed Policies.....	6
3.4 Partnership in Support, Training, Evaluation and Licensing.....	6
3.5 Role of the CUC Ministry and Chaplaincy Committee.....	7
3.6 Role of the Local Chaplaincy Committees.....	8
3.7 Role of the Minister.....	9
3.8 Role of The Canadian Association of Unitarian and Universalists Chaplains (CAUUC).....	10
3.9 Complaint Resolution Process.....	10
4 ROLE AND IDENTITY.....	11
4.1 Name.....	11
4.2 Counselling and Consulting.....	11
4.3 Rites of Passage Conducted.....	12
4.4 Role Confusion and Conflict of Interest.....	12
5. IMPLEMENTATION.....	13
5.1 Number of Chaplains.....	13
5.2 Ministerial students.....	14
5.3 Term of Appointment.....	14
5.4 Requests for Services.....	15
5.5 Evaluation.....	16
5.6 Standards of Practice.....	17
5.7 Contract.....	17
5.8 Financial issues.....	18
5.9 Advertising.....	18
6. TRAINING.....	19
6.1 Ministry and Chaplaincy Committee.....	19
6.2 Other Training Components.....	20
7 SUMMARY OF RECOMMENDATIONS.....	22
Appendix 1.....	25
Appendix 2.....	27
Appendix 3.....	27
Appendix 4.....	29
Appendix 5.....	31
Appendix 6.....	32
Appendix 7.....	34
Date 34	
Appendix 8.....	35

1. APPOINTMENT OF THE TASK FORCE ON CHAPLAINCY

Since it was introduced, the chaplaincy programme has provided a much needed service to our congregations and communities. Most congregations have been well served by their chaplains with few major problems. However, in 1998 the CUC Board concluded that, as with any program that has operated for many years, a review and evaluation of the programme should be conducted. Terms of Reference were approved by the Board (see Appendix 1). Task Force members were appointed ensuring different regions and types of experience with the program were represented. (see Appendix 2). The Task Force began its work in the Fall of 1999.

2 ORIGIN AND PURPOSE OF THE CHAPLAINCY PROGRAM

2.1 Origin of the Chaplaincy Programme

The Canadian Unitarian Council (CUC) was founded in 1960 to address Canadian concerns such as the need for Canadian content in religious education materials, the need for Canadian social responsibility materials and to encourage growth of Unitarianism in Canada.

Very soon after it was founded, 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. Today, chaplains conduct around 1,000 rites of passage each year.

2.2 The Canadian Unitarian Council Today

The 1999-2000 vision statement of the CUC Board reads as follows.

"We connect and empower Canadian Unitarians and Universalists and our congregations by devoting resources to the growth and outreach of our movement by providing:

- Life-span religious education
- Effective professional and lay ministries
- Active participation in national social issues
- Support through a nurturing network of congregations

Each programme and activity of the CUC and of its member societies ought to work with others to promote and enhance these goals thereby enriching and supporting each other as we live out our free and liberal faith. Chaplaincy, a national programme established by the CUC, is no different in this regard than any other. Its purpose and primary raison d'être must be viewed through this lens.

2.3 Purpose of the Chaplaincy Programme

A variety of assumptions about the CUC's chaplaincy programme has developed over the years. Some of these are articulated overtly, while others seem to be assumptions flowing from practice.

The Task Force articulated the following purposes as the most important ones for a healthy, well-running CUC chaplaincy programme. These important purposes ought to be the basis on which policy and pragmatic decisions are made about the CUC's chaplaincy programme and were the foundation for the work of the Chaplaincy Task Force:

- to provide quality Unitarian rites of passage for Unitarian and Universalist members
- to serve the wider community by performing weddings (particularly in cases of people of different faith or race or those not involved in organized religion) services of union, child dedications, funerals and memorial services
- in the context of providing rites of passage:
 - to promote or showcase Unitarian and Universalist values
 - to assist non-Unitarians to connect with our Unitarian and Unitarian Universalist societies
 - to enhance spiritual growth and development of members who serve as chaplains.

The Task Force felt strongly that some of the assumptions about the purposes of the chaplaincy programme do not serve the programme well and are, in fact, ill-suited to the health and proper functioning of the programme. Among the purposes which the Task Force felt ought not to motivate us or to determine policy are the following:

- to establish a free-lance business
- to augment a congregation's operating budget
- to provide counselling
- to provide ministerial leadership in a congregation

2.4 Congregational Polity

The Task Force had to come to a clearer understanding of congregational polity. Congregational polity does not say that the CUC has exclusive authority in matters

pertaining to chaplains, nor does it mean that the CUC has no right to become involved in the affairs of an independent congregation. Much of the history and struggles of the chaplaincy programme can be seen arising from an inadequate understanding of congregational polity. Certainly each Unitarian or Unitarian Universalist society in Canada is an independent society and is first and foremost responsible for the managing of its own affairs. The CUC is an association of independent congregations. Congregational polity, however, is not that simple. The UUA's report entitled "Interdependence" states the following,

"Congregational polity is itself a shared understanding, agreement, and commitment -- in a word, covenant -- among various congregations: it presupposes their being in community and it furthers and sustains the actuality of that community.... Congregationalism meant, and should still mean, not the autonomy of the local church, but the community of autonomous churches... the Cambridge platform notes six duties that congregations owe to each other: care, consultation, admonition, participation, recommendation, and relief."

For a more complete discussion of congregational polity one can refer to the Commission of Appraisal Report (UUA) entitled, "Interdependence".

3 GOVERNANCE

3.1 Mutual Covenant Accountability

Flowing from this understanding of congregational polity the Task Force concluded that there exists between the CUC and its member societies a mutual covenant of governance. Both the CUC and its member societies together are charged with providing adequate support, structure and clear lines of accountability for everyone involved in this programme. The chaplaincy programme does not belong to any one chaplain or society. There are no franchises. The programme belongs jointly to the board of the CUC and to Unitarian and Unitarian Universalist societies in Canada, through society boards and local chaplaincy committees. Stakeholders who have an interest in the programme beyond these groups include Ministers, the Canadian Association of Unitarian Universalist Chaplains (CAUUC), chaplains who are not members of CAUUC, and the CUC Ministry and Chaplaincy Committee.

3.2 Legal Issues

Recently the CUC board has recognized more clearly the potential for legal liability in the case of a chaplain working improperly. In most provinces the CUC is the sponsoring body and stands in a legal line of accountability for the actions of its chaplains. Current Supreme Court decisions have confirmed the idea of "vicarious liability". Even when precautions are taken, a body can be held responsible for the actions of people in a programme it does not directly control. In other words, liability

rests with all in the chain if misconduct by a chaplain occurs. The CUC, the congregation and/or its board, the local chaplaincy committee and the chaplain could all be liable for damages.

The Task Force reminds the member societies that they are part of a chain of accountability. The CUC and its member societies, through their board and local chaplaincy committee, are mutually accountable for the decisions that are made around appointment, training and supervision of chaplains. The CUC cannot abdicate this responsibility to the congregations but must jointly ensure the quality of the chaplains who serve its societies.

Such questions of legal liability represent only one issue, and an issue which it is hoped will seldom if ever arise. The Task Force would not want the CUC to consider only legal issues or to have polity determined by legality. They are only one aspect of this mutual covenant of governance.

This report includes recommendations setting out the conditions which congregations will be required to meet in order to obtain provincial licensing for chaplains through the CUC. In Quebec and Nova Scotia, licensing is requested directly from the province by the local congregation and not by the CUC. To maintain consistency across Canada, the Task Force urges congregations in those provinces to adopt the CUC's requirements.

3.3 Mutually Agreed Policies

Along with their accountability for the programme, both the member societies and the CUC board have the responsibility together to establish clear and consistent policies for the implementation of the programme. While the policy direction needs to be agreed at a CUC Annual Meeting where each member society has representation, the policy details should be delegated to and developed and implemented by the CUC Board, through the Ministry and Chaplaincy Committee. Although the CUC cannot dictate to a member society how it must conduct its affairs, once a policy direction is approved by the member societies at a CUC Annual meeting, each society enters into a covenant with other societies and with the CUC to strive to live within the spirit of this mutual agreement.

3.4 Partnership in Support, Training, Evaluation and Licensing

The CUC and its member societies work in partnership for the betterment of the programme and the accomplishment of the purposes of the programme. The chaplains are responsible to the member societies which have appointed them and to the CUC which, in most cases, submits applications for licences to provincial authorities. It is the responsibility of the appointing society to ensure that adequate support, structure, training and evaluation for their chaplains occurs. Likewise the CUC is responsible, and can be held accountable, to ensure that adequate support, structure, training and evaluation is being done. Each society must assure itself that adequate training and

support is given to the chaplain so as to ensure the highest quality of rites of passage. Such training and support should be a precondition for appointment or reappointment. Likewise, it is the CUC board's responsibility to assure itself that the work of the chaplains, training, and support is of the highest quality before the issuing or re-issuing of licences to any chaplain.

Recommendation: 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.

3.5 Role of the CUC Ministry and Chaplaincy Committee

For its part the CUC board has established an advisory committee called the Ministry and Chaplaincy Committee (M & CC) and usually delegates to it the task of overseeing and implementing the chaplaincy programme. The committee is accountable to the CUC board and its recommendations for the better working of this programme must be approved by the board. Applications for registration of chaplains are approved or declined by the committee and forwarded to the CUC Executive Director for processing. Committee members are drawn from a single geographic region to minimise costs. The committee is currently located in Southern Ontario and was previously in British Columbia. As with almost all CUC committees, minutes of M & CC meetings are open to all members and congregations.

The work of the M & CC is primarily focussed on the chaplaincy programme. The committee consists of at least four people and must include a CUC board member, a minister and a chaplain. A member of the CAUUC sits as a non-voting participant-observer. The Task Force considered whether responsibilities concerning ministers and chaplains should be dealt with by different committees since the roles and issues are significantly different. Even if the functions were separated, the composition of the committee appears generally appropriate for a chaplaincy committee, since the experience and point of view of a minister is needed in matters dealing with our rites of passage.

Ideally a CUC chaplaincy committee would include representatives from across the country. However, with its expanded role the committee will need to meet at least quarterly and possibly more often. The cost of face to face meetings prohibits a national committee and electronic meetings are not yet viable as the only venue for a group such as this. The current system of establishing the committee in a region for a period of time and then relocating it seems fair and workable. However, this should be supplemented by appointing regional representatives to act as a liaison to the committee, providing input on regional and linguistic issues.

While the Task Force concluded it would be appropriate to separate the ministry and chaplaincy functions, it did not consider how this should be accomplished or how issues relating to ministry should be addressed. The current Terms of Reference for the M &

CC are attached at Appendix 4.

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 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 Role of the Local Chaplaincy Committees

The local society, and in some cases the board of a society, is the body responsible for the appointment, reappointment and removal of its chaplains. It is on their recommendation that the CUC will sponsor licences. It is the responsibility of any local society to ensure that each of its chaplains has adequate training, support and evaluation. The individual society has a major stake in this and so is expected to exercise a role ensuring the appointed chaplain is reflecting the Unitarian Universalist principles in their contacts with the public. Often a society will delegate the ongoing overseeing of its chaplain(s) to a local chaplaincy committee and the Task Force is strongly in favour of this model.

The “Model Terms of Reference” for chaplaincy committees in the CUC Chaplaincy Guidelines continue to be appropriate. Membership should include those familiar with the role of chaplain and with rites of passage, including former chaplains, retired ministers, and the serving minister of the congregation.

Every chaplain gains from a well-informed chaplaincy committee in their local society. Such a committee can provide support, consultation, and a forum for working through issues in performance of the role. It can ensure training opportunities are available to the chaplain as well as speak for the chaplaincy within the congregation. A well-functioning chaplaincy committee will assist in meeting the congregation's need for quality services, accountability, evaluation of performance, recruitment of new chaplaincy candidates and good communication between chaplains, minister, local board and the CUC.

Currently the CUC only recommends the formation of a chaplaincy committee. It is not a requirement. The Task Force believes that a local chaplaincy committee is essential for each congregation with a chaplain and that members of that chaplaincy committee should familiarize themselves with the role of chaplains by attending the M & CC regional training. An effective chaplaincy committee will help increase the accountability of the programme and reduce the risk of vicarious liability. For small congregations with few resource people, it may be appropriate for the Board to also act as the chaplaincy committee.

The chaplaincy committee may wish to appoint a mentor for their chaplain to assist them with overseeing and support. Such a mentor would be the primary source of advice and support to the chaplain. The M & CC should be advised of mentors and maintain a list of those willing to assist other congregations.

In most congregations with chaplaincy committees chaplains attend committee meetings and may be *ex officio* and/or voting or non-voting members of the committee. Congregations are cautioned that *ex officio* does not mean “non-voting” unless that is specified. Where chaplains have a vote on the chaplaincy committee they should not constitute a majority of the committee and should absent themselves and/or refrain from voting on matters in which they might have a conflict of interest (e.g. performance or financial matters).

The CUC has established a category of societies which intend to grow and are too small for full membership in the CUC and UUA. These emerging groups usually have need for a chaplain but, because they are not full members of the CUC and often have not yet matured organisationally, may not be in a position to provide appropriate accountability and support. In 1999 the CUC board adopted “Interim Guidelines on Appointing Chaplains for Emerging Groups”. These guidelines provide for the appointment of a chaplain in the emerging group through a mentoring congregation and accountable to the chaplaincy committee of the mentoring congregation. The Task Force believes these guidelines appear to be appropriate, but, after operating for a reasonable period, they should be reviewed by the M & CC in light of the overall recommendations in this report. They are attached at Appendix 5.

Recommendation: That congregations participating in the Chaplaincy programme establish a 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.

3.7 Role of the Minister

In those societies where there is a minister, the minister, as the professional person best equipped to evaluate the quality of rites of passage, is charged with a particular responsibility in assuring the highest quality of rites of passage performed. The minister is frequently the primary resource and consultant to the chaplain with responsibility to provide assistance in training, support, and mentorship. Chaplaincy committees share this role and are usually accountable to the society's board for the local chaplaincy programme. The minister should always be a member of the local chaplaincy committee and be consulted at the time of evaluation (see 5.5 below), appointment or removal.

It is especially important that the minister be available to answer questions and consult with chaplains concerning difficult situations. The chaplain's role may, in part, be to

support the minister, in doing rites that the minister is unable to do and in showcasing Unitarian and Universalist values. Where there is no minister in the congregation there is an ongoing role for an outside minister and/or competent mentor to assist in training and on-going supervision. Administrative and financial arrangements would need to be worked out between the congregations involved.

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

3.8 Role of The Canadian Association of Unitarian and Universalists Chaplains (CAUUC)

The CAUUC was formed in 1987 and is an associate member of the CUC. Associate members are groups and organizations with principles closely akin to those of the Council but with a more limited field of work. Associate members do not speak or act for the CUC.

The CAUUC is a voluntary organization which represents those chaplains who are members of the association. The association makes no claim to the governance of all chaplains nor does it claim to have any legal responsibility for the discipline of chaplains or the basic training of new chaplains. It recognises that these are the responsibility of the CUC. The association has been, and wishes to remain, a solid support group for its members. It has developed a code of ethics for its members. The CAUUC has met annually for many years (before the CUC AGM) to discuss the business of the association and to present enrichment training programmes for chaplains which complement the CUC training. It has indicated that it would like to continue to do so in co-operation with the CUC.

3.9 Complaint Resolution Process

In 1998 the CUC board approved a complaint resolution process to deal with complaints against chaplains which are referred to the CUC. The Task Force has reviewed this process and recommends adoption of the revised process attached as Appendix 6. Congregations should develop procedures for dealing with disputes and complaints locally and most issues should be resolved at that level. The M & CC should be advised early of issues which appear likely to involve public profile or legal liability, (e.g. misconduct or misuse of the licence) and the CUC complaint resolution process will be available if the issue cannot be dealt with locally. The M & CC should also be advised any time a chaplain is terminated for cause.

Recommendation: That congregations develop complaint and dispute resolution procedures.

Recommendation: That the CUC Board adopt the complaint resolution process in

Appendix 6 of this report.

4 ROLE AND IDENTITY

The role of chaplains needs to be clearly defined and boundaries must be recognized by both chaplains and those with whom they interact. This role is frequently misunderstood, both by Unitarians and by those in the wider community who may equate the position with that of a minister.

4.1 Name

The title of those whose function is limited to the provision of rites of passage should be descriptive of the role. The Task Force believes the name “Chaplain” contributes to confusion about the nature of the role. While there is a variety of definitions of “chaplain” in dictionaries, the most common, and more importantly the most commonly understood in the community, is a member of the clergy, frequently one who ministers to the military or in an institution such as a hospital or prison. The Task Force has considered other names including “Celebrant” and “Officiant”. Neither of these names was acceptable to most chaplains and others who provided feedback. The Task Force has concluded the appropriate name is “Lay Chaplain” in English and “Célébrant/Célébrante” in French.

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

4.2 Counselling and Consulting

Chaplains do not receive training as therapists, yet as part of their duties they may be faced with situations where professional help is required. Although counselling is not appropriate, consulting with people is usually necessary and is acceptable provided that such consulting is restricted to the subject matter of making arrangements for a dignified ceremony and allowing for the informed understanding and participation of those involved. The Task Force concludes that it is not appropriate for a chaplain to act as a pastoral counsellor. If a chaplain does have training as a therapist, it is still inappropriate to blend the two roles. There could be legal liability if chaplains go beyond appropriate limits in counselling.

Training and mentoring must occur to ensure that chaplains know the boundaries and are sensitive to issues of role confusion. If a chaplain identifies a situation involving potential danger points, the client or couple should be told that the chaplain is uneasy about the situation. The chaplain may check with the minister, suggest the client speak to the minister or suggest they seek advice or counselling from a trained professional; for example, a specific referral from their family doctor. Using the disclaimer “as a

chaplain I am not a therapist and I can't do counselling" would be a useful strategy. A chaplain may keep a list of available community services but must not refer to a specific provider. This is because if a specific referral turns out to be inappropriate liability issues will arise and because it is not appropriate for a congregation to favour one provider over another.

If a chaplain suspects situations such as child abuse this must be immediately communicated to the authorities as required by provincial law. In the event of suspected spousal abuse, advice should immediately be sought from a minister or a qualified professional or the authorities should be advised.

To give support during grief need not involve counselling. It involves being a good listener and dealing with matters that involve only preparing for the service. Dealing with grief must be addressed in chaplaincy training.

The phrase "consulting on rites of passage" can help to clarify the role of chaplain.

Recommendation: 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.

4.3 Rites of Passage Conducted

Chaplains commonly perform rites of passage such as weddings, unions, child namings funerals and memorial services. However, from time to time there may be requests for less traditional ceremonies such as dissolution of marriage, blessing of homes, memorial service for a pet, or re-affirmation of vows. These non-traditional rites are appropriate for a chaplain to perform. Publicity-seeking events and stunts are not appropriate. Some things which would be acceptable privately (e.g. service for a long-time pet) might not be appropriate as an event open to the media or general public.

Recommendation: That chaplains only perform ceremonies which would be considered suitable and permitted on the congregation's own premises.

4.4 Role Confusion and Conflict of Interest

Like all other members of a congregation who hold a position of responsibility, chaplains should avoid holding other roles which may lead to potential conflicts of interest. For example, as a Board member a chaplain may need to vacate a meeting when discussion on chaplaincy matters such as discipline or remuneration are discussed. Congregations must decide whether there are positions which chaplains may not hold due to the potential for conflict of interest.

Role confusion is an on-going problem, particularly for new members and non-members. A chaplain who regularly appears in the pulpit or assumes some other

leadership role runs the risk of being perceived as a minister. This can lead to unrealistic and inappropriate expectations of the chaplain. New people coming into the congregation will be unfamiliar with the role of the chaplain whose work is largely invisible to members and open to ongoing assumptions and confusion. Congregations, and particularly chaplaincy committees, have a responsibility to educate the society membership, especially new members, of the expectations and limitations of the role. In some congregations, and especially those without a minister, there may be expectations of the chaplain beyond what is appropriate to the role. Training must ensure chaplains are able to recognize the risk of role confusion and find ways to keep their chaplaincy role distinct from other roles or tasks they may have.

Recommendation: 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. IMPLEMENTATION

As of December 2000 there were 75 chaplains conducting approximately 1,200 rites of passage each year. A summary of rites conducted by congregations for 1999/00 appears in Appendix 7. A suggested process for selecting chaplains appears in Appendix 8.

5.1 Number of Chaplains

The current guidelines allow for each congregation normally to appoint two chaplains. Even where few rites are conducted, two chaplains are needed to ensure coverage in times of sickness or absence from the community. The number of chaplains in a congregation needs to be limited according to need due to the cost of training and administration. In deciding whether more than two should be appointed in a congregation, a number of factors should be considered, including the size of the local community, the distance from another Unitarian or Unitarian Universalist congregation, the number of members in the congregation and the number of rites being performed. A chaplain should expect to be available to perform a reasonable number of rites each year where there is the demand. On the other hand, if the demand is excessive, there may be reason to appoint a third chaplain in order to ensure a high standard of rites conducted.

It was agreed there needs to be flexibility to allow an additional or temporary appointment if a chaplain is ill or requires a leave for an extended period of time.

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.

5.2 Ministerial students

Current policy recommends congregations with ministerial students appoint them as chaplains, in addition to the usual number of chaplains appointed by the congregation. The main rationale for this is that it provides students with opportunities to gain experience in leading rites of passage and with a source of income.

Appointing ministerial students as chaplains helps to perpetuate the perception that a chaplain has some kind of a clerical role. The rationale for these appointments directly conflicts with the most important purposes of the programme. The Task Force believes there are other ways in which students can gain rites of passage experience, as happens in other denominations. For example, students could participate in rites of passage conducted by ministers, without an official appointment and should be encouraged to attend rites of passage training offered to chaplains. However, this is beyond the scope of the Task Force mandate.

Recommendation: 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 Term of Appointment

The purposes of the chaplaincy programme are outlined in section 2.3 above. A limited term of appointment is consistent with those purposes. Currently there is no consistency in terms of appointment across the country, though the appointment is subject to annual renewal under CUC guidelines, as required by most provinces. Terms appear to range from a five-year maximum renewed annually in some congregations to indefinite appointments with no contract being the norm in others. The Task Force believes that establishing maximum terms of appointment for chaplains would provide the following benefits:

1. It would allow the role to be distributed among members and provide an opportunity for a number of individuals to both serve the congregation and have a personal growth opportunity within the society
2. It would prevent the chaplaincy position from becoming an income source for the individual
3. It would be consistent with other lay roles in our congregations in which individuals know they are expected to grow with the position and move on to other challenges, hopefully within the church
4. It is our belief that if the chaplaincy position was seen as a term position, like other positions in the church, more people would consider the possibility of serving.

For these reasons, the Task Force believes a limitation on the length of terms should

be a CUC requirement rather than a guideline.

Any maximum term needs to recognise the reality of the position. Chaplains must obtain training and invest time, effort and sometimes money into preparing for the role and maintaining a high standard. If the maximum term is too short, potential candidates may feel that the amount of effort required is not justified. In addition, reaching a high level of performance and comfort in the role takes time and experience. If the maximum term is too short, we could find the role is perpetually fulfilled by inexperienced trainees. A former chaplain should be able to reapply at a later date or be granted annual terms if there is no one available to fill the position after the term is completed.

Chaplaincy committees have a responsibility to educate the congregation in the role of the chaplain and awaken interest in members who may become suitable candidates for chaplaincy. Former and retiring chaplains can become advocates for the programme by informing members of the reward and satisfaction they gained in the role.

The Task Force believes that a period as an observer, and possibly a term on the chaplaincy committee, prior to a six year term, renewed annually, would achieve an appropriate balance and allow for a reasonable period of training and familiarisation with the role. The "observer" period would involve assisting and training with the current chaplain and minister, including attending a number of rites of passage and preparatory interviews and consultations. This would give the proposed chaplain sufficient time to become comfortable and competent in the role, and then work in the position for up to six years. For legal and administrative reasons, congregations need to confirm their chaplains annually with the M & CC.

Recommendation: 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.

5.4 Requests for Services

There are several issues relating to how requests for services come into a congregation, particularly relating to whether the minister has priority in choosing rites and how the congregation views the position of chaplain relative to the minister.

Questions which arise include:

Do all requests go to the minister first?

Does the minister have the first choice to conduct a rite?

Is the chaplain a "back-up" for the minister or independent of the minister?

Can requests by-pass the minister and go directly to the chaplain?

In some larger congregations, the chaplains provide a service that the minister could

not, because of the high volume of requests for services from non-members. In smaller congregations, the chaplain's role may be clearly defined as back-up to the minister. It seems unlikely there can be one model for all congregations. Rather, each congregation needs to decide with its minister how requests will be assigned. It may depend on the precedent in each congregation. However, the rules need to be very clear to both minister and chaplains.

Our purposes state that establishing free-lance businesses and augmenting the congregation's budget ought not to motivate us to perform rites of passage. Likewise, it is inappropriate for ministers to depend upon rites of passage to augment their salaries. If a minister feels the need to do most of the rites of passage for financial reasons then there is a problem which ought to be addressed by the board of the society.

In any congregation with more than one chaplain there needs to be a way to manage the distribution of requests for the services of chaplains. The Task Force suggests congregations develop guidelines that ensure reasonably equal distribution, or a ratio, if both chaplains do not want to be equally involved. Requests for a particular chaplain will occasionally occur but, in general, rites should be distributed fairly. If one chaplain is consistently being requested, something may be wrong. The chaplaincy committee in the congregation should be responsible for monitoring the distribution of referrals, for exploring the reasons for any marked discrepancy and for making recommendations for change. There is no difficulty with chaplains taking personal requests from family and friends.

Recommendations: That congregations have clearly defined policies on allocation of rites between minister and chaplains and between chaplains.

5.5 Evaluation

The work of chaplains involves dealing with individuals at highly sensitive points of their lives. It is vital that the service provided be of the highest quality and appropriate to the situation. To accomplish this, it is essential that chaplains be subject to regular evaluation of their ongoing work. Responsibility for evaluation should rest with the local chaplaincy committee. Such an evaluation should include a recommendation concerning renewal of appointment. Factors in the evaluation, which should be annual, should be consistent nationally and a recommended review process should be established by the CUC.

Techniques which could be used in the evaluation process might include direct observation of the chaplain or printed evaluation forms that users of the chaplaincy service are asked (perhaps by random selection) to complete. If the committee has a retired chaplain and the minister, the evaluation should be very effective.

Although not a substitute for formal evaluation, peer review can be an effective and non-threatening means of providing objective and constructive evaluation. It should be possible for the CUC to develop links between chaplains for peer review. This could be

based on geographic proximity, or size of congregation, for example.

It could be informal and provide an opportunity to discuss issues raised by both reviewer and reviewee pertinent to the chaplain's role without being judgmental.

Recommendation: That evaluation of chaplains be performed annually by the local chaplaincy committee.

Recommendation: That the CUC Board establish a standard recommended evaluation process including the factors to be evaluated.

Recommendation: That the CUC Board facilitate the establishment of links between chaplains and others with rites of passage experience for purposes of peer review and mentorship, including the links already established by CAUUC.

5.6 Standards of Practice

Chaplains exercise a lay rather than a professional function since they have not undergone rigorous training and examination; however chaplains are expected to demonstrate a high level of competence in the functions they perform. While there is no role for a code of ethics such as self-governing professionals might follow, it would be entirely appropriate to establish a code of conduct or standards of practice. The CAUUC could participate in developing these standards.

Recommendation: 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.

5.7 Contract

Congregations need to ensure that key terms and conditions of the relationship between the chaplain and the congregation, as well as the mutual expectations of the role are included in a contract between the chaplain and the congregation. A model contract is provided in the CUC Chaplaincy Guidelines. Any contract should include the term of appointment, remuneration, expectations of availability, benefits, termination procedures, reporting requirements, etc. The contract is overseen by the chaplaincy committee and, in some congregations, the personnel committee. To the extent that a contract, or a policy and procedure referred to in the contract, covers all of the operation of the programme, it will alleviate confusion and misunderstanding. Contracts including minimum requirements established by the CUC Board should be required for all chaplains and should be on file at the CUC along with the yearly renewal.

Recommendation: That the CUC Board establish minimum requirements for chaplains' contracts and all contracts be submitted to the CUC as part of the appointment process.

5.8 Financial issues

In most congregations, ministers perform rites of passage for members and there is no fee involved. In some congregations, the minister has the first right of refusal in conducting rites of passage for non-members and usually the full fee is payable to the minister. In congregations without ministers, or where the minister is not available, chaplains perform rites for members without compensation or are paid by the congregation.

Fees for chaplains' services are usually arranged between the chaplains and the congregation they serve. Commonly part of the fee is retained by the congregation and the balance is paid to the chaplain. Out-of-pocket expenses such as travel costs may also be paid by the person requesting the rite of passage.

While revenue generation is not a purpose of the programme, it is appropriate that part of the fee should be retained by the congregation. However, it is cautioned that congregations should not depend on income from chaplains' services since this can place inappropriate pressure on chaplains to "produce". Since the existence of the chaplain is dependent on the congregation, it is reasonable that part of the congregation's overhead expenses be covered by proceeds from the chaplain's activities. In addition, or alternatively, putting this income back into training and education for the chaplains makes sense, especially if there are limited terms for chaplains which increase the need for training. Each appointing society has a responsibility to assist their chaplains financially with training and skills development. Each appointing society also has the responsibility to assure that adequate resource materials are available to their chaplains. Congregations must also be clear about what other expenses are covered for chaplains including robes, materials and other expenses.

Payment method varies between locations. Fees paid to chaplains are taxable income in their hands. Direct payment by the client to the chaplain may appear to inflate the chaplain's income for tax purposes, and in some cases attempts are made to offset this by accepting the chaplain's payment to the congregation as a charitable donation. This may not be to the benefit of the chaplain. The cleanest method is to have a single cheque paid to the congregation and for the congregation to issue a cheque to the chaplain for their part of the fee and the full out-of-pocket expenses.

Recommendations: That congregations have clearly defined policies on payment procedures.

5.9 Advertising

Advertising is consistent with the raison d'être for the programme. The general public should know there is a congregation like ours to meet their specific needs for rites of passage. Advertising should state the services offered and the society name and

telephone number. It does not need to specify chaplains' names. Advertising would most likely be in the yellow pages or a community newspaper. Chaplains should not advertise their services independently, rather the local board should make decisions regarding advertising. However, the CUC may need to establish some general guidelines for advertising.

The cost of advertising should appropriately come from revenue from the chaplaincy programme. It is important to ensure that the programme is not seen and promoted as a business, but as a service to the community. Wording of the ads is critical in ensuring the intent of the programme is clear. It may be helpful to monitor the results of advertising to identify how many requests for services are generated.

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

6. TRAINING

It was obvious to the task force that competent, consistent and relevant training is one of the most, if not the most important component in the chaplaincy programme. If we are to ensure the quality, effectiveness and vitality of our chaplaincy programme we must provide first class training.

6.1 Ministry and Chaplaincy Committee

The task force recognised that, in the past, formal training under the leadership of the M & CC has been haphazard and often lacked co-ordination, volunteers, proper publicity and sufficient resources to adequately provide this essential training. It is to the credit of our chaplains that they have accomplished so well the tasks that we have given to them.

Local chaplaincy committees, particularly in Western Canada District, continued to present training at various times so new chaplaincy candidates could be trained before they were proposed for appointment. The CAUUC has also recognized this void and has provided some training for our chaplains. Too often it seemed that CAUUC and M & CC training have lacked the co-ordination which would have rendered them complementary to each other.

The Task Force believes that it is the responsibility of the CUC to ensure appropriate training is accessible to chaplains so they will be properly trained to perform Unitarian and Universalist rites of passage that showcase our values and promote our Unitarian and Unitarian Universalist movement. This responsibility cannot be delegated, although certain parts of the training could be provided through other means under the supervision of the M & CC.

The most valuable formal training is sponsored by the M & CC. Each member of the M & CC training team, one chaplain and one minister, brings valuable insight and experience, which would be missing if this training were given either by a minister or chaplain alone. To be adequately trained for the job of chaplain within our movement each chaplain needs to attend such a training event at least once early in their mandate, and preferably before beginning to act as chaplain. In addition, chaplaincy committee members should attend training sessions so that they have a good understanding of the nature of the role.

While training can be delivered on a regional basis, and moved around from time to time within the region, significant travel costs would still be involved for some chaplains to attend. The Task Force believes this burden could be relieved by establishing a dedicated training assistance fund which would result from the contribution of a flat dollar amount from the proceeds of each fee-generating rite conducted. This would be available to the M & CC to assist in covering training and travel costs. Funds generated in this way would ensure each congregation supported training according to the local activity level. Congregations could choose to add this amount to the current fees paid for rites without impacting the income of individual chaplains or increasing expenses of the congregation.

Recommendation: 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.

Recommendation: 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.

6.2 Other Training Components

In addition to M & CC training there are many other training components that can work interdependently and can complement M & CC training. The greater variety of training that a chaplain avails him or herself of, the richer the chaplain will be for it. Other components of training include the following:

- Mentoring on a one-to-one basis

Mentoring by an experienced chaplain or minister is the most effective informal means of training since it is an ongoing process. Where there is no minister or former chaplain with current experience in the congregation, it may be possible to request assistance from a neighbouring congregation.

- CAUUC Workshops, sharing of resources and peer support

Workshops are usually held two days before the CUC Annual General Meeting and a mid-winter retreat is sponsored each February by Toronto area chaplains. CAUUC also connects member chaplains for informal peer support.

- Observation

A new or potential chaplain should attend and observe at least one (and preferably more) rite of passage of each of the categories performed by an experienced chaplain or minister and be provided with time for feedback and discussion.

A newly appointed chaplain should observe the interview process for planning a wedding, a memorial service and a child dedication service before conducting such an interview, with proper caution about confidentiality.

A video could be made of each of these rites of passage to be lent to chaplains in very small congregations where direct observation is more difficult.

In addition, for new chaplains, the following could be implemented:

- While performing the first three rites of passage a chaplain should be accompanied by the minister, a mentor, or a member of the chaplaincy committee who will provide helpful feedback on the ceremony. No formal records need to be kept.
- After six rites of passage, the chaplain should have a more formal evaluation by qualified individuals who have direct experience with the chaplain's work. A written record should be kept.

Recommendation: 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 would make such a resource available to all congregations.

7 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 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. (M)
- 3.7 That ministers serve on the local chaplaincy committee and provide quality assurance, 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).
- 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 mentorship, 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

Appendix 1

TASK FORCE TO REVIEW THE CHAPLAINCY PROGRAM

Mandate

The Mandate of this Task Force is to review the role of the Canadian Unitarian Council's Chaplaincy program and to make recommendations to the Board for appropriate changes. Aspects of the program to be reviewed include:

- What is the purpose of the chaplaincy program?
 - From an historical perspective?
 - Currently what role do chaplains serve?
 - What is the future role of chaplains in our congregations?
 - The CUC's role in supervising chaplains it appoints (congregational polity vs. legal responsibility), including:
 - The appropriateness of the current chaplaincy guidelines
 - Should there be a code of ethics for chaplains?
 - What more do we need to be doing in terms of chaplaincy training, including theology and other areas?
 - Are changes to the appointment process necessary?
- The relationship between Chaplains and Ministers
- Advertising: Should chaplains advertise? If so, where and how?
- Such other areas as may become evident following consultation with the CUC staff, Chaplains, Ministers and Congregations.

Composition of the Task Force

The Task Force shall be appointed by the Board. It will be a national task force chaired by a member of the Board. Membership will include representation from present chaplains, ministry and laity, including members and former members of the Ministry and Chaplaincy Committee, local chaplaincy committees and the Canadian Association of Unitarian Universalist Chaplains.

The Executive Director shall staff this committee unless otherwise determined by the Board.

Process

The Task Force shall determine its own process but shall make every effort to consult with affected parties, including chaplains, ministers, the Board and congregations.

Time Line

The Board as soon as possible after the January meeting will appoint the Task Force. Regular reports shall be made to the Board, with a final report to be presented to the Annual Meeting in the year 2000.

Adopted by the Board, January 1999

Appendix 2

Task Force Members

Rev. Ray Drennan, Montreal, QC
John Hopewell (Chair), Victoria, BC
Carolyn Humphreys, Halifax, NS
Elizabeth McGugan (CAUUC), Victoria, BC
Ken McLachlan, Toronto, ON
Ruth Patrick, Edmonton, AB
Doreen Peever, St. Catharines, ON
Mary Bennett (CUC Staff) Toronto/Vancouver (After July 2000)
Ellen Campbell (CUC Staff), Toronto, ON (prior to July 2000)

Appendix 3

Acknowledgement of Written Submissions

The Task Force greatly appreciates written submissions received from the following:

Allen, Tony
Alton, Janis
Bailey, Don
Booth, Joyce
Bowen, Elizabeth
Brown, Qennifer
Buchanan, George
Canadian Association of Unitarian Universalist Chaplains
Cleary-Dolan, Ruth
Cochrane, John
Colgan, Valerie
Collins, Marie
Cresswell-Jones, Virginia
CUC Annual Meeting Feedback Session
Church of the Unitarian Fellowship of St. Catharines
Drosdowech, Norma
First Unitarian Congregation of Toronto
First Unitarian Congregation of Waterloo
First Unitarian Universalist Church of Winnipeg
Hilborn, Mary
Huronian Unitarian Fellowship
Jack, Richard
Johnston, Christine

Jones, Trudi
Kingston Unitarian Fellowship
Kopke, Rev Brian
Kovary, Germaine
Krutz-Weil, Helen
Kushner, Gordon
Lakehead Unitarian Fellowship
Lakeshore Unitarian Universalist Congregation
MacLellan, Roy
Ministry and Chaplaincy Committee (CUC)
Morrison, Jean
Morrison, Ken
Nidd, Eric
Noble, Ken
Noble, Mary
Raynor, Laura
Rideout, E. Brock
Skelhorne, Jean M
Stein Sather, Rev Katie
Treadwell, Rev Anne
Unitarian Church of Vancouver
Unitarian Church of Edmonton
Unitarian Congregation of South Peel
Unitarian Fellowship of Fredericton
Unitarian Fellowship of London
Unitarian Fellowship of Nanaimo
Urbanski, Felicia
Vickers, Janet
Watson, Bill
Westwood Unitarian Congregation
Whitford, K Joanne R
Willowdale Unitarian Fellowship
Winhall, Joan

Appendix 4

MINISTRY AND CHAPLAINCY COMMITTEE

Terms of Reference

1. The Ministry and Chaplaincy Committee shall consist of not fewer than four persons, of whom at least one shall be a member of the CUC Board, one a minister and one a chaplain. Its membership shall be drawn from one geographical area, so that its members can readily get together for meetings.
2. The committee shall serve as an advisory body to the Board of the CUC, under mandate from which it shall endorse applications from local societies for the registration of chaplains in those provinces where the CUC is the officially recognized body to apply for the licensing of persons for the purpose of officiating at marriages.
3. On the basis of annual reports from societies to the CUC the committee shall make recommendations with regard to the continuing status of chaplains already endorsed.
4. In provinces where the authority to apply for licensing rests with a body other than the CUC the committee shall seek the recognition of such bodies in order to perform as far as possible the same function.
5. The committee shall prepare and maintain guidelines describing the status and duties of chaplains, which shall be publicized to all member societies of the CUC.
6. The committee shall, subject to the approval of the CUC board, establish criteria for the number, qualifications and training of chaplains, to be circulated to the member societies as a guide when making such an appointment.
7. The committee shall receive annually from the CUC office a list of persons recognized by the CUC board as ministers and chaplains in good standing.
8. The committee shall, subject to the approval of the CUC Board, establish and publish criteria for endorsing requests for the registration of ministers.
9. Endorsement by the committee shall not be required for the registration with provincial authorities of persons in good standing (i.e. full or associate fellowship) with the UUA or British General Assembly who have been called as ministers by member societies of the CUC. This shall include interim ministers and ministerial interns. All other persons requesting registration as ministers shall be subject to endorsement by the committee in accordance with the published guidelines.

10. The committee shall maintain liaison with the Canadian Ministers' and Chaplains' Associations and shall encourage continuing dialogue between them.
11. The committee shall periodically review the guidelines for the Percy Simpson Bailey bursaries and make recommendations to the CUC board for any changes in these.
12. The committee shall annually review applications for Percy Simpson Bailey bursaries and make recommendations concerning these to the CUC Board.

Terms of reference approved at the CUC board meetings of May 22, 1973, and March 2, 1975, with revisions approved at the CUC board meeting of May 17, 1991.

Appendix 5

INTERIM GUIDELINES ON APPOINTING CHAPLAINS FOR EMERGING GROUPS

An emerging group may have a chaplain appointed by the mentoring congregation and the CUC. The CUC's Chaplaincy Guidelines (Reference 2) describes the chaplaincy program in Canada and an emerging group should become familiar with this publication before considering having its own chaplain.

The Need for an Emerging Group to Have a Chaplain

Before a chaplain is appointed, the emerging group should be well established in the community and have enough members (about 15 - 20) to warrant the services of a chaplain. The group must be able to ensure that adequate training, supervision and ongoing support for the chaplain can be provided.

Selection and Appointment of Chaplains

The request for a chaplain must come from the emerging group to the mentoring congregation. The chaplain should be a member of the emerging group. The mentoring congregation is responsible for making a formal request to the Ministry and Chaplaincy Committee of the CUC. The request is handled by the Chaplaincy Committee of the mentoring congregation. When a mentoring congregation is appointing a chaplain for an emerging group, a representative of the emerging group should be on the Chaplaincy Committee.

Accountability

The chaplain is accountable to the Chaplaincy Committee of the mentoring congregation and through it, to the Board of Trustees of the mentoring congregation, and through it to the CUC.

Chaplain's Responsibilities

The chaplain is appointed to provide rites of passage to the members of the emerging group, when needed. Offering chaplaincy to emerging groups is similar to the original purpose of chaplaincy: to provide rites of passage to members where there is no licensed clergy to do so. As an outreach activity, an emerging group's chaplain may also perform rites of passage for members of the community who are not affiliated with the emerging group.

Training and Overseeing Work of Chaplain

The Chaplaincy Committee should be involved in training and overseeing the work of the chaplain. If the mentoring congregation has a minister, s/he should also be involved. If possible, a prospective chaplain should participate in a CUC training workshop prior to appointment.

If an emerging group is not familiar with the way the chaplaincy program is intended to operate, it may need considerable assistance and direction from the mentoring congregation as it develops.

Adopted by the CUC Board January 30, 1999

Appendix 6

Complaint Resolution Procedures

Congregations should develop procedures for dealing with disputes and complaints locally and most issues should be resolved at that level. The CUC Ministry & Chaplaincy Committee (M & CC) should be advised early of issues which appear likely to involve public profile or legal liability, (e.g. misconduct or misuse of the licence). The CUC complaint resolution process will be available if an issue cannot be dealt with locally.

Upon referral of a complaint, the M & CC shall provide the chaplain whose conduct is the subject matter of the complaint with a copy of the complaint within 10 days of receipt of such a complaint and shall provide the chaplain an opportunity to respond in writing to the complaint within a further 10 days.

The complainant shall be provided with a copy of the chaplain's reply and be given a further 10 days to respond.

At the first M & CC meeting following the completion of the above process The M & CC shall consider the complaint. The committee may:

- dismiss the complaint
- refer the complaint to an investigatory sub-committee for further investigation and recommendation
- take such other action as the committee determines is warranted in the circumstances of the case.

Where the M & CC determines that further investigation is required, they shall appoint an investigatory sub-committee. Where possible, at least one member of the sub-committee shall be a member of the M & CC and shall serve as chair of the sub-committee.

The terms of reference of the sub-committee shall be determined by the Ministry and Chaplaincy Committee. The sub-committee may be asked to serve only a fact-finding role or may be asked for its recommendations regarding the disposition of the complaint. The sub-committee shall endeavour to meet within 20 days of appointment.

The investigatory sub-committee shall determine its own procedures but shall give full opportunity to the parties to make submissions with respect to the complaint.

After completing its investigation and considering all relevant information, the investigatory sub-committee shall forward to the M & CC a report of its findings. Where the M & CC has requested recommendations regarding the disposition of the complaint, such recommendations shall be included in the report.

The M & CC may refer the matter back to the sub-committee for further investigation or clarification.

A copy of the sub-committee's report shall be forwarded to the Complainant and to the Respondent chaplain.

After considering the report of the sub-committee, the M & CC shall make recommendations to the CUC board regarding the disposition of the complaint.

Recommendations may include:

- dismissal of the complaint
- a verbal caution
- a written reprimand
- a suspension of chaplaincy privileges
- a revocation of chaplaincy privileges
- a continuation of chaplaincy privileges on condition
- direction for further chaplaincy training
- any combination of the above or
- such other action as the M & CC considers appropriate and necessary to respond to the complaint

Before making its decision the CUC board may refer the matter back to the M & CC for further investigation or clarification.

The time lines set out in these procedures may be extended by the M & CC. However, it is intended that the handling of complaints pursuant to these procedures be as expeditious as is reasonably possible.

The CUC board may, on the recommendation of the M & CC, suspend the authority of a chaplain pending the completion of an investigation. Such power shall be exercised only in circumstances where the board is satisfied that the continuation of the chaplaincy poses a threat to the public or would otherwise jeopardize the integrity of the chaplaincy programme.

Appendix 7

Rites of Passages Conducted in 1998/99 and 1999/00 by Congregation as reported to the CUC.

Congregation	Date	Marriages	Unions	Memorials	Child Dedications
Beacon	99/00	1	0	0	0
Comox Valley	99/00	14	0	0	0
Kamloops	99/00	4	0	0	0
Nanaimo	99/00	2	0	2	0
North Shore	99/00	6	0	3	1
Vancouver	99/00	34	0	0	3
Victoria	99/00	20	1	2	1
Capital	99/00	3	1	1	0
Calgary	99/00	9	0	5	4
Edmonton	99/00	19	3	8	1
Westwood	99/00	0	0	0	0
Lethbridge	99/00	0	0	0	0
Red Deer	99/00	1	0	0	0
Regina	99/00	1	0	0	0
Saskatoon	99/00	2	0	1	0
Winnipeg	99/00	9	1	2	1
Don Heights	99/00	23	0	3	7
Guelph	99/00	30	2	2	2
Hamilton	99/00	0	0	1	0
Huronia	99/00	0	0	0	0
Kingston	99/00	32	0	0	0
Lakehead	99/00	44	0	3	2
London	99/00	69	1	3	2
NW Toronto	99/00	64	0	7	3
Olinda	99/00	5	0	0	0
Ottawa First	99/00	57	0	8	11
Quinte	99/00	14	0	0	0
Sarnia- Port Huron	99/00	4	0	3	0
South Peel	99/00	157	1	7	7
Toronto First	99/00	71	8	4	4
Waterloo	99/00	12	0	0	1
Willowdale	99/00	158	2	1	3
Lakeshore	99/00	75	1	6	19
Montreal	99/00	65	2	4	8
North Hatley	99/00	11	1	2	2
Fredericton	99/00	4	0	0	0
P.E.I.	99/00	1	0	0	0
Saint John	99/00	0	0	0	0

Note: A congregation may not be included because the CUC did not receive Rites of Passage information or there is no Chaplain at such congregation.

Appendix 8

Suggested Chaplain Selection Process

Appointment Procedure

The appointment of Chaplains is governed by procedures directed by the Canadian Unitarian Council (CUC) office in Toronto and administered by the CUC Ministry & Chaplaincy Committee.

Chaplains, appointed or elected, are responsible to the Board of Trustees and the Chaplaincy Committee in their local Congregation, and are registered with their local Provincial government by the Canadian Unitarian Council (except for Quebec and Nova Scotia).

Purpose of the Position

Chaplains prepare for and officiate at “Rites of Passage” (weddings, services of union, funerals and memorial services, child dedication services) for the general public and in some instances, for members of the congregation, in keeping with the suggested guidelines issued by the CUC and established by the local Chaplaincy Committee/Board of Trustees.

Relationship to the Congregation

The chaplains’ training and performance of services are under the supervision of the Chaplaincy Committee, in consultation with the Minister(s), if available, and other members, as appropriate, to maintain liaison and co-ordination of activities and events.

Qualifications

Applicants for the position of Chaplain should have the following minimum qualifications:

1. be a member in good standing in his/her Congregation;
2. be actively involved with the life of his/her congregation, prior to acceptance;
3. articulate why he/she wishes to become a Chaplain;
4. be able to work flexible hours, which tend to be mainly evenings and weekends;

Qualities

Because the Rites of Passage mark some of the most important events in people's lives, the chaplaincy program constitutes a significant outreach to the public.

Therefore, a Chaplain must have:

1. a working knowledge and commitment to Principles of Unitarianism and the ability to articulate that philosophy;
2. maturity and the ability to cope in crisis situations;
3. the ability to communicate with people in a spirit of empathy, helpfulness and concern;
4. an effective public speaking voice and manner;
5. self-presentation and conduct which favourably represents his/her congregation and the Denomination;
6. the ability to conduct Rites of Passage with sensitivity to, and acceptance of varied cultural, spiritual and religious traditions and be willing to adhere to the CUC standards of practice for Chaplains;
7. have a sense of personal responsibility and commitment to the chaplaincy program and the capacity to work both independently and as a team member.

Training and Professional Development

A Chaplain is expected to:

1. attend and successfully complete a CUC sponsored training workshop prior to acceptance, if possible,
2. as a chaplain-in-training, be mentored by experienced Chaplains and, if available, a Minister;
3. attend regular professional development sessions within reasonable limits of time and cost, e.g. meetings of the Canadian Association of Unitarian Universalist Chaplains (CAUUC) held prior to each CUC annual meeting;
4. attend and participate in local Chaplaincy Committee meetings and activities;
5. have an evaluation on a yearly basis by the local Chaplaincy Committee/ Board of Trustees.