

CANADIAN CONSEIL  
UNITARIAN UNITARIEN  
COUNCIL DU CANADA



## LAY CHAPLAINCY PROGRAM MANUAL

**Revised 2010**

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# CUC Lay Chaplaincy Program Manual

## INTRODUCTION

This edition of the Lay Chaplaincy Program Manual was revised in 2010 to reflect current titles, practices, guidelines, and policies. Every attempt has been made to clarify guidelines with more precise wording and examples.

Significant revisions to the original 2003 document can be found in the following sections:

- Purposes of the CUC Lay Chaplaincy Program
- Initial and Enrichment Training
- Code of Practice
- Conflict of Interest Guidelines
- Counseling versus Consulting
- Requests for Service
- Resource Materials

Input on this manual is welcomed from all interested parties. You can send your inquiries and suggestions to the CUC office at [lcc@cuc.ca](mailto:lcc@cuc.ca). When further revisions are made, all congregations and lay chaplains will be duly informed. Access to the document can be attained by going to the Canadian Unitarian Council website link at [http://www.cuc.ca/lay\\_chaplaincy/index.htm](http://www.cuc.ca/lay_chaplaincy/index.htm)

## PURPOSE OF THE MANUAL

The purpose of this manual is to provide an easily accessible and consolidated collection of the current policies and practices of the Lay Chaplaincy Program. The manual has been produced in loose-leaf format so that changes or new materials can easily be added. We hope it will serve as a useful, current reference for Congregational Lay Chaplaincy Committees, Lay Chaplains' Support Groups, applicants for lay chaplaincy positions, and interested members and friends of congregations.

The policies and procedures outlined in this manual meet the guidelines published in 2003 by the Canadian Unitarian Council, which is available on the CUC website at [http://www.cuc.ca/lay\\_chaplaincy/index.htm](http://www.cuc.ca/lay_chaplaincy/index.htm) under Archives.

## MISSION STATEMENT

The Canadian Unitarian Council Lay Chaplaincy Program helps client couples and families in need of meaningful rite of passage ceremonies, at places chosen by them, by recognizing their personal beliefs and wishes, while being sensitive to the needs of others who attend the ceremony, and reflecting Unitarian and Unitarian Universalist values that afford respect and acceptance of those who follow different paths of faith.

**Feedback Requested**

This manual is intended to be a useful workbook. Please take a moment to provide feedback to the CUC-LC Program Steering Committee about its usefulness.

1. Which section(s) did you refer to most often?
2. Please give page numbers of any poorly worded sections that you think need revising.
3. Which sections did you find least useful that were specifically directed to your role in the program?
4. What changes would you recommend?
5. What additions would you recommend to make the manual more useful to you in your congregation?

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## **PART ONE**

### **HISTORY AND OVERVIEW**

#### **Origin**

The CUC Lay Chaplaincy Program was implemented in 1970 in response to specific needs for Unitarian rites of passage. At that time there were few ministers in Canada to meet these needs within their own congregations, much less requests from other fellowships in their districts, which often required significant travel time.

This new program allowed congregations to recommend one of their members to the CUC to be licensed to perform marriages. The CUC then applied to the various provincial authorities on behalf of the congregation, becoming the legally responsible agent. In Nova Scotia, Prince Edward Island and Quebec, however, congregations are allowed to apply for their own licence, for which they are legally responsible. The term 'chaplaincy' was selected to name this new program.

#### **Reference Documents**

In 2006, the Canadian Unitarian Newsletter included a four-page insert on the Lay Chaplaincy Program to celebrate its 35 years of programming. In the same year, the CUC produced a pamphlet about the program.

These documents are available on the CUC website and through the Toronto office.

#### **Purposes of the CUC Lay Chaplaincy Program**

The primary purpose of the program is to provide quality rites of passage in a manner consistent with the CUC-endorsed Principles and Sources for members of the public and members of CUC congregations in situations where a minister is not available.

#### ***The program also serves the following secondary purposes:***

1. to promote or showcase Unitarian and Unitarian Universalist values
2. to assist non-Unitarians in connecting with our Unitarian and Unitarian Universalist congregations
3. to enhance the spiritual growth and development of lay chaplains.

#### **CUC Task Force on Chaplaincy**

From its introduction until 1998, the Lay Chaplaincy Program provided a much-needed service to our congregations and communities. Most congregations were well served by their lay chaplains, who conducted about 1,000 rites of passage per year, 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 program should be conducted. The Board approved Terms of Reference, and Task Force members were appointed to ensure that different regions and types of experience with the program were represented. The Task Force began its work in the Fall of 1999, and published its report and recommendations in January, 2001.

Delegates at the 2001 Annual Meeting in Montreal adopted the following recommendations:

1. The name "Chaplain" was changed to "**Lay Chaplain**" or **Célébrant/e** in French.
2. The responsibilities of the Ministry and Chaplaincy Committee were divided into two areas, one related to ministry and one to lay chaplaincy. The then Executive Director (and now Director of Congregational Services), after consulting with the CUC Board, if necessary, registers those acting in a ministerial capacity with our congregations with provincial authorities. The Chaplaincy Committee was then renamed the CUC **Lay Chaplaincy Committee (LCC)**, (and in 2010 renamed the CUC Lay Chaplaincy Program Steering Committee) and the Committee was charged with implementing the recommendations that had been adopted.
3. Registration of those acting in a ministerial capacity be handled by the Director of Congregational Services in consultation with the CUC Board.
4. A **Theological Education Funds Committee** be set up to handle bursaries.
5. The CUC Lay Chaplaincy Program Steering Committee take responsibility for developing and delivering formal, comprehensive training programs for lay chaplains.
6. A \$10.00 levy per fee-paying rite of passage conducted by lay chaplains be collected from congregations to fund the Lay Chaplaincy Training Programs.

## **PART TWO**

### **THE LAY CHAPLAIN**

#### **Purpose of the Position**

In general, lay chaplains prepare for and officiate at rites of passage (weddings, funerals and memorial services, child dedication services) for the general public and, in congregations without ministers, for members of the congregation, following guidelines issued by the CUC and additional policies established by each congregation's Board of Trustees.

#### **Relationship to the Congregation**

Lay chaplains are appointed by their congregations for a term of up to 6 years and are responsible to their Board of Trustees. They enter into a contract with the congregation which is renewed annually, as is their appointment by the congregation.

Lay chaplains are under the supervision of their Congregational Lay Chaplaincy Committee (or Board of Trustees) in the performance of services, and will consult with the minister(s) and other staff members as appropriate to maintain liaison and coordination of activities and events.

Lay chaplains are expected to be available to attend and participate in CLC Committee meetings and activities and to participate in an evaluation by the CLC Committee or the Board of Trustees after the first year of service and every two years thereafter.

Lay chaplains are registered with provincial governments in order to be licensed wedding officiants. The CUC is responsible for registering lay chaplains in all provinces except Nova Scotia, Prince Edward Island and Quebec where the congregations are directly responsible for registration with the province.

#### **General Expectations**

Lay chaplains are considered to be leaders of our religious community. As such, they are expected to participate in all facets of congregational life and the larger denomination as interest and time permit.

Lay Chaplaincy is an important outreach program of the congregation and the lay chaplains are representatives of our congregation in the wider community. They are expected to perform rites of passage in a manner that celebrates and dignifies those special occasions in human life, adding spiritual depth to the lives of individuals and communities. Lay chaplains are at all times expected to interact with the larger community in a professional manner, and to understand and be able to articulate and model Unitarian and Unitarian Universalist principles and practice.



## Qualifications

A lay chaplain must:

1. be a member in good standing of their congregation  
*Note: Some congregations specify a length of time that a person must be a member before applying to become a lay chaplain;*
2. be actively involved in the life of his/her congregation, prior to acceptance
3. articulate why he/she wishes to become a lay chaplain
4. be willing to adhere to the Code of Practice for lay chaplains (see below)
5. be willing to adhere to the Conflict of Interest Guidelines (see below)
6. be willing to adhere to the Counseling vs. Consulting Guidelines (see below)
7. be willing to sign the congregation's standard contract
8. be willing to conduct all standard rites of passage: weddings, memorial services and funerals and child dedications
9. be able to provide or arrange transportation to the service
10. be able to work flexible hours and respond quickly to requests

## Qualities

Because the rites of passage mark some of the most important events in people's lives, and because the lay chaplain constitutes a significant outreach to the public by the congregation, a lay chaplain must have:

1. a working knowledge and commitment to the Principles of Unitarian and Unitarian Universalism and the ability to articulate and model UU principles and practice
2. the maturity and ability to cope in crisis situations
3. the ability to communicate easily 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 represent the congregation and the denomination.
6. the ability to conduct rites of passage with sensitivity to and acceptance of varied cultural, spiritual and religious traditions
7. have a sense of personal responsibility and commitment to the lay chaplaincy program and the capacity to work both independently and as a team member with the minister, individual members and the congregation

## **Training and Enrichment Expectations**

Lay chaplains are expected to successfully complete initial training, approved by the CUC- Lay Chaplaincy Program Steering Committee, which is conducted by ministers and experienced lay chaplains who are encouraged to contribute to the training program by presenting or co-presenting a module.

In addition, lay chaplains are expected to attend regular enrichment training sessions, within reasonable limits of time and cost, e.g. the training provided prior to each CUC annual conference and meeting, the BC and Western Regional Gatherings, the Mid-winter Conference coordinated by Unitarian Congregations of Greater Toronto.

## **Rationale**

The greater the variety of training in which a lay chaplain participates, the better his/her performance in the role is likely to be. Varied opportunities are offered beyond the local congregation, or the CUC, such as education given by funeral homes for conducting memorial services, and courses on the meaning of ritual given by universities and colleges. Participation in as many of these opportunities as possible is strongly encouraged

The CUC recommends a lay chaplain-in-training approach whereby a year before they are appointed, lay chaplains are affirmed at their congregation's Annual Meeting and spend a year shadowing and learning the role. The congregation can apply to the CUC during this year to register the lay chaplains so that the paperwork is ready when they are finished their training year.

### ***Specific responsibilities with respect to rites-of-passage services may include:***

1. providing information on rites of passage in the Unitarian tradition
2. preparing the service in consultation with the clients
3. arranging for and conduct rehearsals of wedding services as needed with the clients
4. assisting in the musical arrangements for services if required
5. ensuring that final arrangements for services are well coordinated
6. officiating at services of rites of passage (weddings, funerals and memorial services, child dedication services)
7. ensuring that the integrity and security of the church premises are maintained, when services are held on those premises
8. ensuring that the legal requirements for registration of marriage are met
9. maintaining, in addition to the civil register, a record of services performed, fees earned and expenses incurred
10. providing the necessary data regarding clients and services to meet the reporting requirements of the congregation's Board of Trustees, the congregational treasurer, and the Congregational Lay Chaplaincy Committee.

***See also details set out in Part 6 – Operational Considerations***

## **Lay Chaplain Code of Practice**

### **Statement of Purpose**

The following was developed by the former Canadian UU Lay Chaplains' Association (CUULCA) and approved at its May 2006 annual meeting.

The **Code of Practice** is a statement of the lay chaplains' serious intent, and expresses their common concerns and loyalties.

As a lay chaplain appointed by my congregation under the guidelines of the Canadian Unitarian Council, I give full assent to this Code of Practice.

### **Self**

1. I commit myself, before all else, to an honest and responsible performance of my duties and my role as lay chaplain.
2. I take responsibility for my spiritual development and growth.
3. I will identify areas of weakness and improve them with training, mentoring, etc.
4. Knowing my limitations, I will seek help when in difficulty.
5. I will sustain in my own mind respect for the Lay Chaplaincy Program.
6. I will refrain from words and actions (or simply behaviour and attitudes) that degrade the Lay Chaplaincy Program, or are destructive to congregational life.

### **Colleagues**

1. I will do my best to support my colleagues and to keep, for them, an open mind and heart.
2. I will respect confidentiality between colleagues.
3. I will not speak disrespectfully or in derogation of any colleague.
4. When critical of a colleague, I will speak responsibly, temperately, and constructively.
5. I support fair and equitable sharing of ceremonial requests.
6. When co-officiating, I will work in cooperation and in accordance to clearly defined responsibilities.

### **Community**

1. I will hold to a single standard of respect and help for all members of the church and larger community.
2. I will respect the confidentiality of private communications.
3. I will respect the private and intimate boundaries of others' lives, and I will not trespass on those boundaries for my own advantage. My relationship with families requesting special services remains professional.
4. I will avoid exploiting the needs of another person for my own purposes, e.g., continue a dependent relationship beyond a service.

5. I will treat with respect and sensitivity the religious beliefs and cultural traditions of others.
6. I will strive to live and to speak in a way that exemplifies the best of Unitarian and Unitarian Universalist values and traditions.

### **Lay Chaplain *Consulting* vs. *Counseling* Guidelines**

Lay Chaplains provide information and consultation about rites of passage and must be careful they do not provide advice or support that could be considered counseling. However support and encouragement are integral to consulting and so are acceptable within the context of making arrangements for a dignified ceremony and allowing for the informed understanding and participation of those involved. Lay chaplains are like good salespersons who listen to learn what the client wants, then fills the need in a supportive and encouraging way.

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

To avoid moving from supporting and encouraging into the realm of counseling, congregations are required by the CUC to include in the lay chaplains' contracts a declaration that the lay chaplain will not engage in counseling that goes beyond consulting on rites of passage. In addition, training, especially the basic training, and mentoring must ensure that lay chaplains know the distinctions between counseling and consulting and understand the boundaries.

In performing their role as lay chaplains, they may encounter situations where professional help is required. A lay chaplain who is a professionally trained therapist must not provide counseling as it is inappropriate and a potential conflict of interest to combine the two roles.

If a lay chaplain identifies a situation involving potential danger points, the lay chaplain should advise the client or couple that s/he is uneasy about the situation. The lay chaplain may check with the minister (if the congregation has one), suggest that the client speak to the minister, or suggest that they seek advice or counseling from a trained professional (suggesting, for example, a specific referral from their family doctor). A lay chaplain may keep a list of available community services, but must not refer to a specific provider to avoid potential liability, if a specific referral turns out to be inappropriate and also because it is not appropriate for a congregation to favour one provider over another.

If the lay chaplain suspects situations of child abuse, this must be immediately communicated to the authorities in accordance with provincial law. In the event of suspected spousal abuse, advice should immediately be sought from a minister or a qualified professional, or the appropriate authorities should be advised.

### **Lay Chaplain Conflict of Interest Guidelines**

In order to maintain the integrity of the lay chaplaincy program, lay chaplains must avoid situations which could create a possible or perceived conflict of interest. Responsibility lies with both the CLC Committee and the lay chaplains themselves to educate the congregation and the larger public that the role of the lay chaplain is solely to provide rites of passage.

The following are specific areas of potential conflict of interest that must be avoided:

**1. *Using the role as a primary source of income for the lay chaplain or the congregation***

This could compromise the spirit and purposes of the Lay Chaplaincy Program. It could lead to competition among lay chaplains in the congregation or in surrounding congregations, potentially creating dissension and discord. It could create pressure to resist the rotation of different persons in the lay chaplain role or to resist the addition of more lay chaplains in a congregation. Should the congregation come to depend on lay chaplaincy income, inappropriate pressure could be placed on lay chaplains.

**2. *Providing, concurrently, a similar service as an independent business or for another organization without disclosure of the dual role to the congregation***

The perceived competition between the services provided as a lay chaplain for the congregation and the lay chaplain's business could pose an ethical and/or financial conflict. There is also the risk of confusion of the two roles in the larger community.

**3. *Agreeing to requests not to identify oneself as a Unitarian lay chaplain***

This contravenes the stated purposes of the lay chaplaincy program, which are to promote and showcase Unitarian and Unitarian Universalist values and to assist non-Unitarians to connect with Unitarian and Unitarian Universalist congregations. Lay chaplains must always identify themselves as a Unitarian lay chaplain when acting on behalf of their congregations in that role.

**4. *Counseling clients while providing lay chaplaincy services to them***

Lay Chaplains provide information and consultation about rites of passage and must not provide counseling. They may, when appropriate or by request, provide information about counseling services. Even if lay chaplains are professional counselors in their own right, they must offer lay chaplaincy clients information about other counseling resources when requested, rather than providing counseling services themselves.

**5. *Providing ministerial leadership in a congregation, even when there is not a congregational minister***

This could lead to role confusion and false expectations, as the lay chaplain could be seen as a minister. The provision of other forms of lay leadership by lay chaplains, such as serving as a committee chair or member of the Board or leading worship services, should be reviewed by the CLC Committee on an individual basis to determine whether there would be a conflict of interest or perceived role confusion. Congregations are encouraged to build a broad base of leadership.

**6. *Providing a rite of passage for a member in a congregation when that congregation is served by a professional minister, unless requested to do so by the minister***

Professional ministers, appointed by the congregation, have primary responsibility for providing rites of passage for members of the congregation. Regarding all rites of passage for non members, the minister and the lay chaplains should develop a right working relationship with each other within the context of the CLC Committee and develop a fair system for sharing of rites of passage. During the search process for a new minister, a congregation should ensure that each ministerial applicant is introduced to the principles,

purposes, and practices of the Congregational Lay Chaplaincy Program, especially because of its uniqueness to Canada.

## **Employee or Self-Employment Guideline**

In the Canada Revenue Agency publication called “Employee or Self-Employed”, there is a set of questions that gives you the opportunity to evaluate whether lay chaplains have a Business Relationship or Employer-Employee relationship with their congregations in the Unitarian Universalist denomination. The CUC Lay Chaplaincy Program Steering Committee suggests that you obtain this and another publication called, “Business and Professional Income” from the federal government.

### Employer-Employee Relationship

<http://www.cra-arc.gc.ca/ebci/cjcm/srch/bscSrch?lang=en&prevBscSrch=Employment%2Bor%2BSelf-Employment&bscSrch=Business+and+Professi>

### Business and Professional Income

<http://www.cra-arc.gc.ca/ebci/cjcm/srch/bscSrch?lang=en&bscSrch=Employment+or+Self-Employment&Submit=Search>

## **PART THREE**

### **PERSONNEL POLICIES REGARDING LAY CHAPLAINS**

#### **Recruitment and Selection**

The Congregational Lay Chaplaincy Committee (CLC Committee) is responsible for finding qualified applicants to serve as lay chaplains, and for ensuring that there are applicants sought at least a year in advance of the retirement of a lay chaplain. The CUC-Lay Chaplaincy Program Steering Committee (CUC-LC Program Steering Committee) encourages applicants to attend a Basics Training Course in advance of their appointment by their congregation, and to shadow practising lay chaplains when possible and amenable to the families being served.

Once a successful interview and reference checks of the applicant have been conducted by the CLC Committee, the Chair of the CLC Committee will make a recommendation to the congregation's Board of Trustees to have him/her appointed at the next suitable congregational meeting.

Prior to the congregation appointing the candidate and the candidate signing the contract with the congregation, the Chair of the CLC Committee advises the CUC-LC Program Steering Committee Liaison to recommend the candidate for CUC-LC Program Steering Committee approval.

#### **Registration with CUC and Provincial Government**

Following approval of the candidate by the CUC- LC Program Steering Committee and his/her appointment by the congregation, the Chair of the CLC Committee advises the CUC Administrative and Data Coordinator of the appointment. The Administrative and Data Coordinator is responsible for applying for registration of lay chaplains as licensed marriage officiants in all provinces except Nova Scotia, Prince Edward Island and Quebec where the congregations are directly responsible for registration with the provincial licensing body.

**See Appendix B Lay Chaplain Application Process** for more details.

#### **Request for Additional Lay Chaplains**

Where a congregation feels it needs lay chaplains in addition to those already prescribed and approved by the CUC, a letter of request should be submitted to the CUC- LC Program Steering Committee. The letter should address the following areas as appropriate. These will be considered by the CUC-LC Program Steering Committee before approving any extra lay chaplains to a congregation.

- Community connections– e.g., differences in language or culture not able to be addressed by the current lay chaplains, number of rites performed by the current lay chaplains, niche markets (such as BGLT).
- Congregational circumstances have changed e.g. gained/lost a minister, larger congregation than before.
- Limitations on current lay chaplains e.g. health issues, mobility issues, temporary leave needed, large area to service for outreach

## **Term of Appointment**

After their appointment, lay chaplains must be affirmed annually by a congregational vote, and a new or renewed one year contract must be signed with the congregation. They may serve a maximum term of six years. The six year term starts when they are licensed to perform marriages.

### **Benefits of maximum terms of appointment**

1. Allowing the role to be distributed among members of a congregation, thus providing an opportunity for a number of individuals to both serve the congregation and experience personal growth.
2. Preventing the lay chaplaincy position from becoming a primary income source for an individual.
3. Discouraging the perception that the lay chaplaincy designation belongs to an individual and that the appointment is permanent. This is 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 within our faith community.

The CUC-LC Program Steering Committee is willing to work with individual congregations on a transition plan, and to increase the amount of training and support to new or prospective lay chaplains.

### **Extension of Maximum Term**

It is assumed that after the maximum term the current lay chaplain is retired from this role. If, at the end of a lay chaplain's maximum term, and following a vigorous search, the CLC Committee is unable to find a suitable replacement, the congregation may apply to the CUC-LC Program Steering Committee for approval to extend the term. The term may be extended annually for an additional term of one year, up to a maximum of three years, with the approval of the CUC-LC Program Steering Committee.

Any extension will only be for a temporary period of time under special circumstances. The conditions for extension are:

- An approval of a one year extension at a time to a maximum of three years.
- The first year the CLC Committee will have to demonstrate they have done a vigorous search for a succeeding lay chaplain.
- The second year there will have to be a lay chaplain in training.
- The third year will have to be a special approval by the CUC-LC Program Steering Committee.
- After that, no more extensions will be approved. If necessary there will be a period of indeterminate length without lay chaplain services at the church/Fellowship.

The CUC-LC Program Steering Committee Liaison could offer to give a workshop to the congregation to help them with recruitment.



## Retiring and Retired Lay Chaplains

As the maximum term of a lay chaplain approaches, the CLC Committee needs to consider appropriate exiting and recognition strategies, and be sensitive to the feelings of loss that a retiring lay chaplain will likely experience. (Sample ceremonies for honouring retiring and incoming lay chaplains are provided on the CUC website.)

## Role of the Retired Lay Chaplain

When a family specifies explicitly that it wants a particular former lay chaplain to perform a memorial service or child dedication, the retired lay chaplain should decline and explain the protocol around not performing services as a lay chaplain. The said lay chaplain should strongly consider the following responses:

- request that the practising lay chaplain be present
- agree to do the service without the claim that s/he is or was a lay chaplain
- do the service at an alternate location from the church
- provide the service free of charge

## Reappointment

When a lay chaplain has completed the initial maximum term, or resigns the lay chaplaincy position before the initial maximum term, she/he is permitted to reapply after a period of time. The time off before reapplying is usually one year off for each year served.

## Evaluation of Lay Chaplains

One of the tasks of the CLC Committee is to conduct ongoing feedback and a performance evaluation of the congregation's lay chaplains at the end of the first year of service and every two years thereafter. The purpose is to ensure that the quality of service is maintained, and any problems are quickly resolved. A final evaluation should include the various components evaluated during the course of the year. Thank you letters, photos and referrals form a useful part of the evaluation process. The CLC Committee should retain copies for the congregation's files. (See **Appendix B**, for a model of the Evaluation Process).

A performance evaluation serves to highlight strengths, while identifying and nurturing growth points. Evaluation focuses on the performance, not the performer.

### ***An evaluation of a lay chaplain's performance should include:***

1. demonstrated commitment to personal spiritual growth
2. attendance at and contribution to initial and ongoing training opportunities
3. evidence of respectful consideration of those persons with whom she/he interacts
4. the quality of the preparation and presentation of rite of passage ceremonies
5. the maintenance and prompt submission of required activity and financial records

***Attention should be given to behaviour such as:***

1. being consistently late or unprepared for ceremonies; assuming a role or exercising responsibilities beyond that of an officiant, such as providing therapeutic counseling to individuals or families
2. initiating what might be construed as sexual or physical harassing behaviour; making demeaning comments about colleagues
3. lacking stewardship in managing and/or reporting financial and/or activity records
4. responding selectively to requests for services
5. exhibiting a lack of decorum at public events

This difficult task can be eased somewhat for the CLC Committee member(s) who are assigned to remove the lay chaplain by considering the following steps:

1. Consult with others to ensure objectivity, and in the case of poor performance
2. Corroborate and organize the facts.
3. Conduct an ongoing evaluation procedure in order that the information does not come as a surprise to the individual.
4. Expedite the decision. Choose an appropriate time to meet with the individual when privacy can be assured. Point out the positive contribution the lay chaplain has made before explaining why the individual's performance is unacceptable.
5. Have all the facts on hand at the meeting. Give the individual time to respond but be firm and clear in a respectful manner. It is important that the individual understands why she/he is being removed as a lay chaplain and when the termination is in effect.
6. The spokesperson(s) need to avoid emotional statements or anger. It is important to be explicit, objective and to the point.
7. When appropriate, it may be suggested that the individual might perform satisfactorily in another role within the congregation better suited to his/her temperament and/or capabilities.

## **Termination**

Careful screening, providing ongoing training, and having established policies and related procedures should provide sufficient congregational support for a lay chaplain who is happy, effective and competent in his/her role. Unfortunately, despite our Unitarian and Unitarian Universalist philosophy that speaks to the inherent worth and dignity of individuals, there are occasions when a lay chaplain's performance may be deemed to be unsatisfactory and termination of his/her contract may be necessary.

## **Dealing with Complaints**

The Task Force on Chaplaincy (2001) recommended that congregations develop their own complaint and dispute resolution procedures, and that the CUC Board should adopt a complementary complaint resolution process.

Details of the procedure to be followed when there are complaints involving lay chaplains are set out in Part 5

## PART FOUR

### ROLE OF THE CONGREGATIONAL LAY CHAPLAINCY COMMITTEE; THE MINISTER; THE CUC- LAY CHAPLAINCY PROGRAM STEERING COMMITTEE

#### Congregational Polity

Much of the history and struggle of the Lay Chaplaincy Program has arisen from an inadequate understanding of congregational polity. Each Unitarian or Unitarian Universalist congregation in Canada is an independent congregation and is first and foremost responsible for managing its own affairs. The CUC is an association of independent congregations. Its purpose is to support those congregations.

While the CUC does not have exclusive authority in matters pertaining to lay chaplains (the congregation must choose the lay chaplains and monitor their work), it has a responsibility to ensure that all member congregations are acting consistently within their obligations, legal and otherwise. It also has a responsibility to ensure that congregations are responsibly working with provincial and federal authorities.

#### Congregational Lay Chaplaincy Committee

Each individual congregation must have a Congregational Lay Chaplaincy Committee (CUC Committee) or designated members of the Board to oversee the work of their lay chaplains and ensure that CUC policies are followed and guidelines are respected.

#### Lay Chaplaincy Committees in Emerging Groups

The CUC has established a category of societies that intend to grow but are now too small for full membership in the CUC. These emerging groups usually have a need for a lay chaplain but, because they are not full members of the CUC and often have not yet matured organizationally, they may not be in a position to provide appropriate accountability and support.

In 1999 the CUC Board adopted the *Interim Guidelines on Appointing Lay Chaplains for Emerging Groups*. These guidelines provide for the appointment of a lay chaplain in the emerging group through a mentoring congregation. They are accountable to the CLC Committee of the mentoring congregation. The emergent group's responsibility includes sending the training levy per paid service to the CUC annually. The duties of the mentoring congregation cease when the emergent group achieves full congregational status from the CUC. The CUC- Lay Chaplaincy Program Steering Committee can assist and monitor this process.

#### Members of the Congregational Lay Chaplaincy Committee

In small congregations, the CLC Committee might be the Board of Directors, with an individual identified as responsible for overseeing the program. Members of a CLC Committee should include people who have some knowledge of the program, or who offer leadership to the congregation, such as retired lay chaplains, board members, retired ministers and others who have provided leadership to the congregation. The minister, if there is one, should also be on this Committee.

The CLC Committee (or Board) should decide:

- a) whether the minister will be a voting or non-voting member
- b) whether the lay chaplains have voting privileges; if so, they must abstain from voting on remuneration or contractual decisions.

## **Roles and Responsibilities of the Congregational Lay Chaplaincy Committee**

The CLC Committee is responsible for overseeing the Lay Chaplaincy Program by following the CUC guidelines, policies and mandates found in this Manual.

**See Appendix B** for resources available on the CUC website:

1. CUC Lay Chaplain Application Process
2. Application Form for New Lay Chaplains
3. Model Interview Form
4. Model Lay Chaplaincy Contract
5. Renewal Form
6. Assessment of fees to CUC

## **Model Lay Chaplaincy Contract**

A copy of your congregation's signed contract with your lay chaplain(s) should be forwarded to the CUC annually with the Renewal Form.

### **Meetings**

The CLC Committee should meet regularly, and at least four times a year, to discuss the lay chaplains' feedback and needs regarding rites-of-passage observations, resources, training, funding for training and outreach.

The CLC Committee will work throughout the year to address the following responsibilities as needed:

#### **Create**

A CLC Committee Policies Manual, complementary to this Manual, that establishes congregational policies and procedures including but not limited to:

- fee for service structure
- method for collection and distribution of fee for service
- contract language based on model Lay Chaplaincy Contract
- policy for sharing Rites-of-Passage requests
- right relations policy between minister and lay chaplains including but not limited to a policy for replacement officiants for those rites of passage where the minister has been booked and is unable to attend

- a policy regarding right relations among lay chaplains
- back-up procedure for unanticipated situations
- appropriate exiting and recognition strategies for retiring lay chaplains
- a complaint procedure consistent with those adopted by the CUC (See Part 5)
- policy for evaluating and reviewing lay chaplain performance and progress

### **Monitor**

- the record keeping of services performed
- that the training levy for services performed is submitted to the CUC
- the number of services per lay chaplain to determine an optimal number of lay chaplains needed in a congregation,

### **Conduct**

- evaluations and prepare annual contract renewals
- a search for other members to consider the role of lay chaplaincy at least a year before a lay chaplain's position becomes open is recommended.
- training sessions as requested by the CUC –LC Program Steering Committee
- an interview with lay chaplain candidates in order to ensure that the candidate meets the qualification criteria according to CUC Lay Chaplaincy Guidelines,
- induction and retirement ceremonies for new and retiring lay chaplains, together with the Board and the Worship Committee.

### **Review**

- potential conflict of interest situations

### **Maintain**

- a list of lay chaplains from neighbouring congregations, (if possible), to call upon in case of the unavailability of our own lay chaplains.
- a list of scheduled rites of passages, date and contact number, so someone can fill in for the scheduled lay chaplain in the event of an emergency where the scheduled lay chaplain cannot attend
- annual contracts
- current website information with the local congregational webmaster
- communication with the CUC- LC Program Steering-West or East Liaison

**Recommend**

- the appointment of new lay chaplains at any congregational meeting,
- the reappointment of lay chaplains to the Board/congregation annually to a maximum of six years at the annual congregational meeting
- a line-item in the congregational budget to support lay chaplains and the CLC Committee in doing their work.

**Prepare**

- submissions to the Lay Chaplaincy column in the congregation's newsletter
- an annual report to the congregational AGM

***Register the following documents with the CUC Office in a timely manner:***

- endorsement document of new lay chaplains, along with candidate's information sheet and contract
- renewal form for status of lay chaplain
- extension of term application letter for lay chaplain that includes statement of rationale
- lay chaplaincy training fund levy annually by December 31st
- notification of any lay chaplain retirements/resignations

**Role of the Minister**

In those congregations where there is a minister, s/he, 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 lay chaplains. S/he can help provide assistance in training, support, and mentorship. The minister should always be a member of the CLC Committee and be consulted at the time of evaluation.

It is especially important that the minister be available to answer questions and consult with lay chaplains concerning difficult situations. The lay chaplains' role may, in part, be to support the minister. They may perform rites that the minister is unable to do. They may be called to support the congregation, and to showcase Unitarian and Unitarian Universalist values.

Where there is no minister in the congregation, there may be a need for an outside minister and/or competent mentor to assist in training and ongoing supervision. Administrative and financial arrangements would need to be worked out between the congregations involved.

**Role and Responsibilities of the CUC Lay Chaplaincy Program Steering Committees (CUC-Lay Chaplaincy Program Steering Committee-West, CUC-Lay Chaplaincy Program Steering Committee-East)**

The Congregational Lay Chaplaincy Program is supported through the CUC- Lay Chaplaincy Program Steering Committee. Its work is to help member congregations use their Lay Chaplaincy programs well. Members of the CUC- LC Program Steering Committee act as

liaison to congregations in their particular region of Canada and are willing to respond to questions and offer support when required.

The CUC-LC Program Steering Committee is made up of two parallel committees reporting to the Director of Congregational Services who is the staff person responsible for the program. Each committee oversees its respective regions of Canada. On recommendation of the CUC-LC Program Steering Committees, the Director of Congregational Services may make policy recommendations to the CUC Board. On occasion, the CUC Board may set up a Task Force to assist them in evaluation or policy development.

The Committee members include at least one minister, lay chaplain, and Congregational Lay Chaplaincy Committee member. The committees will strive to be representative of the regions they serve. The committees are called CUC- LC Program Steering Committee-West, (BC & Western Regions - from Thunder Bay, west), and CUC- LC Program Steering Committee-East (Central & Eastern Regions – east of Thunderbay).

***Committee responsibilities include:***

1. monitoring collection of levy for training fund from rites of passage for the CUC
2. providing support to CLC Committees—answering questions and pro-actively making contact
3. participating in strategic planning for the program
4. planning and administering lay chaplaincy training
5. approving or declining applications for new lay chaplains
6. forwarding the applications to the Director of Congregational Services for processing
7. participating in complaints resolution as required (Part 5)

Each congregation can request help from the CUC- LC Program Steering Committee to:

- give an introduction/presentation of the LC Program in person, to be funded by the CUC. One congregation a year/Liaison is the goal.
- offer to give a joint service with the congregation's CLC Committee.
- help with promotion – e.g. provide samples of brochures, cards, etc. that will promote outreach in their community

**Role of the Minister on the CUC- Lay Chaplaincy Program Steering Committee (East and West)**

It is the intention that a minister serves on each of the two CUC- LC Program Steering Committees.

Recognizing that lay chaplaincy is an essential ministry of the CUC and each of its congregations, we believe that increased communication, collaboration and mutual support between lay chaplains and professional ministry is of great benefit to us all.

There are several areas where a minister can be of particular service to these committees. These are to:



1. maintain a focus on the spiritual development of lay chaplains. This can be done through trainings, through celebrations with the lay chaplains' congregations, and as part of the regular business of the CUC- LC Program Steering Committees. A minister may pay particular attention to, and hold up for others, those moments and events in which a lay chaplain gains spiritual growth or awakening in the process of their duties as a lay chaplain.
2. foster right relations within the CUC- LC Program Steering Committees, between the committee members and their assigned congregations, and between lay chaplains and their congregations. A minister may provide mentoring and counseling in these relationships by being available and listening to the needs of lay chaplains. This is of particular import for those lay chaplains who serve congregations without professional ministry.
3. minister to the CUC- LC Program Steering Committee Members. The members of these committees have taken on a responsibility that may at times be stressful and demanding, and at other times fulfilling and rewarding. The minister may aid the committee members in both celebrating and making meaning of their service to the CUC.
4. liaise with other professional ministers. The minister may provide a helpful link between CUC ministers and the Lay Chaplaincy Program. This could be of great benefit to ministers who are new to Canada and are unfamiliar with the Program.
5. to uphold a vision of lay chaplaincy within the context of our shared principles.

With respect for the unique gifts, needs and contributions of each individual involved in the many aspects of lay chaplaincy and the CUC- LC Program Steering Committees, the unique gifts and contributions of the minister are also encouraged and welcomed.

Minutes of the CUC- LC Program Steering Committee meetings are available upon request to all members and congregations.

The CUC- LC Program Steering Committee members meet regularly by teleconference and meet face-to-face annually as feasible. E-mail is used to consult on immediate decisions and to deal with urgent matters.

Each member of the CUC- LC Program Steering Committee is charged with responsibility for liaising with congregations in a geographically defined group of congregations. The name of the congregation's Lay Chaplaincy Committee liaison can be obtained from the CUC. CUC- LC Program Steering Committee members do not liaise with their own home congregation.

### **CUC Lay Chaplaincy Training Programs**

The CUC and its congregations work in partnership for the betterment of the Lay Chaplaincy Program, and the accomplishment of the purposes of the program. The CUC is responsible, and can be held accountable, for ensuring that adequate support, structure, training and evaluation is being done, and for assuring itself that these are of the highest quality in each individual case before the issuing or re-issuing of licences to any lay chaplain.

The CUC has delegated to its Lay Chaplaincy Program Steering Committee the task of overseeing and implementing the Lay Chaplaincy Program, and it is this Committee which has the responsibility of putting in place a minimum schedule of two Lay Chaplaincy Training Programs each year in different parts of the country. To be adequately trained for the role of lay chaplain within our movement, the CUC considers that each lay chaplain needs to attend the basics training program *Designing and Leading Rites of Passage* early in his/her mandate, and preferably before beginning to act as lay chaplain. This training shall take place twice yearly at alternate locations that change in the east and west of Canada to maximize accessibility.

There are also opportunities for enrichment training throughout the year; including the day prior to the CUC Annual Conference and Meeting in May. The fee submitted by congregations for each rite of passage performed by their lay chaplains covers a major part of the expenses involved in these programs.

### **Enrichment Courses offered by the CUC**

Enrichment courses are open to those who have the stipulated amount of experience as a lay chaplain in a Unitarian or UU Congregation and who are currently serving in that role. As enrolment may be limited, lay chaplains with the required number of years' experience, ministers and ministerial students will be accepted on a first-come/first-served basis from the date that their non-refundable registration fee is received.

Lay chaplains with less than the stipulated amount of experience, lay chaplains in training and CLC Committee members can be put on a wait list. Fourteen days prior to the session, if space is available, the wait list will be opened to (in order):

1. Lay chaplains with less experience in the host congregation
2. Lay chaplains with less experience in other congregations
3. Lay chaplains in training in the host congregation
4. Lay chaplains in training in other congregations
5. CLC Committee members in the host congregation
6. CLC Committee members in other congregations

**Communication, Outreach and Promotion**

This is an enrichment training module that can be requested by lay chaplains. It includes brainstorming different ways to promote lay chaplaincy to the community.

See APPENDIX B for resources

**International Guests at Lay Chaplaincy Training**

Under some circumstances, ministers (lay or ordained), staff, students, and members of Unitarian Universalist congregations in the U.S. or other international Unitarian and Universalist groups will be invited to attend a session. The CUC may request an increased fee to cover the real cost of the course rather than the subsidized cost. When an application is received, the trainers for that session, along with the Director of Congregational Services and the chair of the CUC LC Program Steering Committee-East or West, will make a decision. Principles of accepting such guests will be that their attendance does not limit the attendance of those in the primary target audience (i.e., we do not expect to turn others away) and that their attendance is seen as enhancing the educational experience of the lay chaplains attending. If accepted, such guests will be asked to learn about the CUC Lay Chaplaincy Program in advance so they understand the context of the training.

## **PART FIVE – COMPLAINT RESOLUTION**

### **Section I - Role of the Congregational Lay Chaplaincy Committee**

Congregations, as well as the CUC, should develop their own complaint and dispute resolution procedures. The following procedures are those recommended for adoption:

1. Most disputes and complaints involving lay chaplaincy can and should be resolved at the congregational level. The CUC- LC Program Steering Committee should be advised as early as possible of issues which appear likely to involve public profile or legal liability (e.g., misconduct or misuse of the licence). The CUC– LC Program Steering Committee should also be advised whenever a lay chaplain's position is terminated for cause.
2. When a complaint is received by a CLC Committee, the lay chaplain whose conduct is the subject of the complaint shall be informed immediately and be given a copy of a written complaint, if applicable. The CLC Committee should provide the lay chaplain with an opportunity to respond within 10 days. Careful documentation of such complaint, the notice to the lay chaplain, and the lay chaplain's response is strongly encouraged. The complainant should be fully informed of the procedure and be provided with a copy of the lay chaplain's response.
3. The complaint and response will be considered at the first meeting of the CLC Committee following the completion of the above process and the lay chaplain will be present at the meeting.
4. The CLC Committee may:
  - a) determine that no further action is needed
  - b) attempt to resolve the complain informally
  - c) refer the complaint to the congregation's Board for action
5. Where the issue cannot be dealt with at the congregational level, the matter will be referred to the CUC-LC Program Steering Committee and the CUC complaint resolution process will be followed.

### **Section II - Role of the CUC–Lay Chaplaincy Program Steering Committee**

1. When a complaint is referred to the CUC- LC Program Steering Committee by a congregation, the Committee may:
  - a) dismiss the complaint
  - b) refer the complaint to an investigatory sub-committee for further investigation and recommendation
  - c) take such other action as the Committee determines is warranted in the circumstances of the case.

2. Where the CUC- LC Program Steering Committee 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 CUC- LC Program Steering Committee and shall serve as Chair of the sub-committee.
3. The terms of reference of the sub-committee shall be determined by the CUC- LC Program Steering 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 all parties involved to make submissions with respect to the complaint and to ensure that all are adequately heard.
4. After completing its investigation and considering all relevant information, the investigatory sub-committee shall forward to the CUC- LC Program Steering Committee a report of its findings. Where the CUC- LC Program Steering Committee has requested recommendations regarding the disposition of the complaint, such recommendations shall be included in the report. The CUC- LC Program Steering Committee may refer the matter back to the sub-committee for further investigation or clarification.
5. A copy of the sub-committee's final report shall be forwarded to the complainant, the Respondent, and the Chair of the CLC Committee or congregational Board which submitted the complaint for investigation.

### **Section III - Role of the CUC Board**

1. After considering the report of the sub-committee, the CUC- LC Program Steering Committee shall make recommendations to the CUC Board regarding the disposition of the complaint.

Recommendations may include:

- a) dismissal of the complaint
  - b) a written caution or reprimand
  - c) a suspension of lay chaplaincy privileges
  - d) a revocation of lay chaplaincy privileges
  - e) a continuation of lay chaplaincy privileges on condition
  - f) direction for further lay chaplaincy training
  - g) any combination of the above
  - h) such other action as the CUC- LC Program Steering Committee considers appropriate and necessary to respond to the complaint.
2. Before making its decision, the CUC Board may refer the matter back to the CUC- LC Program Steering Committee for further investigation or clarification.
  3. The CUC Board may, on the recommendation of the CUC- LC Program Steering Committee, suspend the authority of a lay 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 lay chaplain poses a threat to the public or would otherwise jeopardize the integrity of the Lay Chaplaincy Program.

4. It is intended, and considered important, that the handling of complaints pursuant to these procedures be as expeditious as is reasonably possible. Any of the parties who are dissatisfied with the outcome of these procedures may appeal directly to the CUC for further review. Consultation by all parties with the appropriate CUC Staff person, CUC- LC Program Steering Committee member and congregational representatives is strongly encouraged at all stages of the complaint resolution.

## **PART SIX - OPERATIONAL CONSIDERATIONS**

### **Familiarity with Marriage Act**

As each jurisdiction in Canada has a discrete Marriage Act. CCL Committees and lay chaplains need to be familiar with the content of the Act in their province. (use web search engine to find "Marriage Act" in each jurisdiction).

Changes with regard to officiant qualifications, eligibility for marriage, record keeping, etcetera, may be made without public notice, so it is a wise practice to monitor these changes and, where possible, to publicize them to other congregations and colleagues in your jurisdiction.

### **Officiating at Funerals, Memorial Services, and Child Dedications**

In most jurisdictions in Canada, it is not necessary to have a licence to officiate at a funeral, memorial service and child dedication ceremony. Your provincial or territorial government will clarify the regulations in your jurisdiction. Also please see the CUC guidelines for retired lay chaplains in Part 3 of this Manual.

### **Congregational Administrative Support**

Although practices will vary from congregation to congregation, lay chaplains are often provided with daytime and after-hour access to the congregation's office and meeting spaces, computers, telephone, photocopier and fax machines, and postage and stationery supplies. However it is important that the administration and the lay chaplains discuss and are respectful of any restrictions in that practice (e.g. no access to the minister's/staff private offices for client interviews)

### **Fees for Service**

Each congregation's CLC Committee is encouraged to establish and annually review the fees for the rites of passage performed by their lay chaplain(s). Local practice will dictate a fee structure that provides, as appropriate, for contributions to the congregation's overhead, the CUC- LC Program Steering Committee training fund, travel allowances in addition to the lay chaplain's compensation. It is recommended that the congregation's minister's fees for rites of passage outside the membership should be no less than the lay chaplain's fees.

### **Requests for Service**

Each CLC Committee should establish a policy that describes how requests for lay chaplaincy services are to be received, recorded and, as required, forwarded to the lay chaplain(s). The information gathered might include how the caller learned about the program, information-only inquiries, and cancellations.

Over time the statistics generated can prove to be useful in evaluating many elements of the program, including workload and promotion of the lay chaplaincy program.

Where there is more than one lay chaplain in a congregation, it is important to have a policy about how to share the rites of passage services among the lay chaplains.

Lay chaplains are not required to perform services that they are not comfortable with. If one lay chaplain is uncomfortable with a proposed ceremony, s/he could ask the other lay chaplain(s) in the congregation to perform it. If none of the lay chaplains is willing /able to perform a ceremony, it can be tactfully refused or referred to a lay chaplain in another congregation where appropriate.

## **Right Relations Between Lay Chaplains and Ministers**

It is essential for the minister and the lay chaplain(s) to establish a right-working relationship policy with each other so that the goals of the lay chaplaincy program are met and their respective responsibilities are clearly delineated. In congregations with ministers, it is customary for the minister to deliver all rites of passage services to members of the congregation as part of his or her professional services to the congregation. When a new minister starts, it is advisable for the minister, the lay chaplains, and the CLC Committee to have a discussion about how requests for services from the public are to be handled. This is especially important for a new minister who may not be familiar with the Lay Chaplaincy Program which is unique to Canada.

## **Reporting and Record Keeping**

The Marriage Act in each province requires lay chaplains to maintain a register(s) of all weddings performed.

As well as being useful tools for information and planning at the Congregational and CUC- LC Program Steering Committee levels, these registers are required by law, and failure to maintain them could result in serious consequences for the CLC Committee and the individual lay chaplain.

Congregations may wish to maintain a record book of other rites of passage performed by lay chaplains e.g. funerals and memorial services and child dedications.

## **Emergency Backup**

Each congregation should establish a back-up assistance plan to address those unanticipated situations where, because of illness or extreme emergency, a lay chaplain is unable to officiate at a scheduled rite of passage ceremony. This procedure reflects issues related to good practice and public relations as well as corporate and individual liability.

Congregations may want to consider ensuring that lay chaplains provide a current listing of their confirmed ceremonies to a lay chaplain colleague, CLC Committee member, minister, staff person or other appropriate individual.

This list could include:

1. type of ceremony
2. date
3. place and time of the ceremony



4. names, addresses and contact numbers of key persons involved, and the name, address, contact person, and telephone number of the venue.

As a matter of good practice, lay chaplains and CLC Committee members might maintain a list of the names and contact numbers of other area lay chaplains and ministers.

## APPENDIX A

### A Summary of CUC Task Force Recommendations

This summary includes all recommendations in the report. Some of these the task force considers **mandatory** (M), to be implemented by the CUC as requirements for congregations to participate in the program. 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 lay 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 CUC-Lay Chaplaincy Program Steering 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, chaplains, former chaplains, ministers, lay chaplaincy committees, <sup>2</sup>(Canadian Unitarian and Universalist Lay Chaplains' Association) and the CUC Board. Regional liaisons should be appointed to assist the Committee in its work.
- 3.6 That congregations participating in the Chaplaincy Program establish a Congregational Chaplaincy Committee under terms of reference which include minimum requirements approved by the CUC Board and a clear contract with the lay chaplain(s). The Committee will provide a summary report annually through the Congregational Lay Chaplaincy Committee to the CUC-LCC listing activities, evaluations, future training requirements and concerns. (M)
- 3.7 That ministers serve on the Congregational 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.
- 3.9a That those congregations develop complaint and dispute resolution procedures
- 3.9b 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 lay chaplain's contract a declaration that they will not engage in counseling beyond consulting on rites of passage. The training program-must cover the distinction between counseling 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 lay chaplains are able to recognize 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 lay 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 lay chaplains serve a six-year term, affirmed annually by the congregation. If, following a vigorous search, the Congregational Lay Chaplaincy Committee is unable to find a suitable candidate, a term may be extended annually with the approval of the CUC-LC Program Steering Committee (M)
- 5.4** That congregations have clearly defined policies on allocation of rites between minister and lay chaplains and between lay chaplains.
- 5.5a** That evaluation of lay chaplains is performed after the first year of service and every two years thereafter by the Congregational Lay Chaplaincy Committee. (M)
- 5.5b** That the CUC Board establishes a standard recommended evaluation process including the factors to be evaluated. (M)
- 5.5c** That the CUC Board facilitates the establishment of links between lay chaplains and others with rites of passage experiences for purposes of peer review and mentorship by hosting a networking session at each ACM
- 5.6** That, in consultation with stakeholders, the CUC Board, through the CUC-LC Program Steering Committee, develops Standards of Practice for lay chaplains to which each lay chaplain will be required to subscribe. (M)
- 5.7** That the CUC Board establish minimum requirements for lay 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 establishes guidelines for appropriate advertising.
- 6.1a** That the CUC Board develops a more adequate model for training lay chaplains and Lay Chaplaincy Committees, and ensure training is offered when and where required. Funding will be provided by the CUC-LC Program Steering Committee and 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 lay chaplains. This money is to be used by the CUC-LC Program Steering Committee to create a training program and subsidize ongoing training. Congregations are encouraged, in addition, to include funds in their budgets specifically designated to send current and potential lay chaplains to formal training workshops and to pay for resource materials. (M)

## APPENDIX B Resources

The following can be found at: [http://www.cuc.ca/lay\\_chaplaincy](http://www.cuc.ca/lay_chaplaincy)

Or ask your CUC Lay Chaplaincy Committee Liaison to send copies if you do not have access to the Internet.

1. **Model Lay Chaplain Interview Form**  
[http://cuc.ca/wp-content/uploads/2011/10/LC\\_ModelInterviewForm.pdf](http://cuc.ca/wp-content/uploads/2011/10/LC_ModelInterviewForm.pdf)
2. **Recruiting New Lay Chaplains and Lay Chaplain Committee Members**  
[http://cuc.ca/wp-content/uploads/2011/10/LC\\_Recruiting.pdf](http://cuc.ca/wp-content/uploads/2011/10/LC_Recruiting.pdf)
3. **Lay Chaplain Application Responsibilities and Process**  
[http://cuc.ca/wp-content/uploads/2011/10/LC\\_ApplicationProcessChecklist.pdf](http://cuc.ca/wp-content/uploads/2011/10/LC_ApplicationProcessChecklist.pdf)  
[http://cuc.ca/wp-content/uploads/2011/10/LC\\_ApplicationProcessFlowchart.pdf](http://cuc.ca/wp-content/uploads/2011/10/LC_ApplicationProcessFlowchart.pdf)  
[http://cuc.ca/wp-content/uploads/2011/10/LC\\_RecruitingCheck-List.pdf](http://cuc.ca/wp-content/uploads/2011/10/LC_RecruitingCheck-List.pdf)
4. **Assessment Form For Lay Chaplaincy Training Fund**  
<http://cuc.ca/wp-content/uploads/2011/10/lcassessment.pdf>
5. **Application for Endorsement and Registration of Lay Chaplain Form**  
<http://cuc.ca/lay-chaplain-registration-form>
6. **Renewal of Status of Lay Chaplain Form**  
<http://cuc.ca/lay-chaplaincy-renewal-form>
7. **Provincial Marriage Act Requirements of Lay Chaplains**  
Officially required words for the declaration of vows by clergy or appointed church officiates can be obtained by using a search engine for "Marriage Act". It is advised you check with lawyer in each jurisdiction for confirmation:
8. **Model Evaluation Process Kit For Large Congregations**  
<http://cuc.ca/wp-content/uploads/2011/10/LCCEvaluationProcess2006.pdf>
9. **Model Evaluation Form for Medium and Small Congregations**  
[http://cuc.ca/wp-content/uploads/2011/10/LC\\_ModelFormEvaluation-Small-Medium.pdf](http://cuc.ca/wp-content/uploads/2011/10/LC_ModelFormEvaluation-Small-Medium.pdf)
10. **Lay Chaplaincy Brochure**  
<http://cuc.ca/wp-content/uploads/2011/10/LCCpamphlet.doc>

**11. Communication, Outreach and Promotion – How to Promote Your Lay Chaplaincy Services**

<http://cuc.ca/wp-content/uploads/2011/10/2006LCCNews.pdf>

**12. Guidelines for Wearing Stoles**

<http://cuc.ca/lay-chaplaincy/policy-on-stoles>

**13. CUC- Lay Chaplaincy Program Steering Committee-West and East**

Current members of these committees can be found on the website.

<http://cuc.ca/lay-chaplaincy-committees>