

**RESOURCE ON POLICY RESEARCH AND RECOMMENDATIONS FOR  
SIMPLIFIED PASTORAL RELATIONS (2011, 2011, 2003)**

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## **PASTORAL RELATIONS PRINCIPLES, MODEL AND POLICY RECOMMENDATIONS**

### **Proposal**

THAT the Permanent Committee on Ministry and Employment Policies and Services receive the following principles, pastoral relations model, and recommendations, with the attached policy document, to support changes to the pastoral relations processes of The United Church of Canada.

The Pastoral Relations Policy Review Steering Group recommends that:

### **Principles**

1. That the following values guide the establishment and implementation of Pastoral Relations Policies for the United Church of Canada: dignity, fairness, faithfulness, integrity, respect, and trust.
2. The purpose of the establishment and application of Pastoral Relations Policies is healthy pastoral relationships, and effective ministry leadership.
3. That healthy pastoral relationships in The United Church of Canada be defined by the following characteristics: a commitment to clear and honest communication; intentional pairing of the mission and goals of the pastoral charge with the experience, knowledge and skills of the ministry personnel; mutual responsibility for and accountability to the relationship; clear roles; acknowledgement of and respect for boundaries; a willingness to grow and change; trust; respect; and integrity.

### **Pastoral Relations Model**

1. The Court of the Conference is responsible for implementing policies that govern the establishment of a pastoral relationship by placement, call, or appointment; and the oversight and discipline of ministry personnel;
2. The Court of the Presbytery is responsible for pastoral care of ministry personnel, collegiality among ministry personnel, and the mission and ministry of local ministries within their bounds;
3. Paid accountable staff of the Conference resource the pastoral relations policies of the United Church and participate in their implementation;
4. Ministry personnel of The United Church of Canada are accountable to uphold the Ethical Standards and aspire to meet or exceed the Standards of Practice;

5. Pastoral relations policies are in plain language and adaptable with the aim that they may be understood and interpreted in as wide a variety of contexts as exist throughout the United Church
6. Pastoral relations policies are harmonized, where possible and practical with the Human Resources policies of the General Council Office to ensure fairness and legality.

### **Recommendations**

1. The attached policies be approved;
2. The United Church address concerns about part-time ministry, and the increasing reliance of local ministries on part-time ministry due to financial strain;
3. The General Council develop programs and resources to address concerns about ministry personnel work load and the ability of ministry personnel to appropriately balance vocational and personal life;
4. The United Church address the issue of appointment-based ministry, and the challenge that continually renewed appointments creates for the church in trying to ensure that pastoral relations policies meet or exceed federal employment standards;
5. The United Church addresses the streams of ministry, and considers the usefulness of the various streams.

### **History**

The Pastoral Relations Policy Review Steering Group is mandated to:

1. assess the Pastoral Relations policies
2. recommend changes to policies
3. simplify policy development and implementation processes
4. reconcile inconsistencies within the system
5. ensure harmonization of the Human Resources Policies of the General Council office and the Pastoral Relations system, and
6. present interim reports to the Permanent Committee on Ministry and Employment Policies and Services between 2009 and 2012

### **Background**

The Pastoral Relations Policy Review Steering Group began meeting in March 2010 with an elected member complement of eight. Since that time the group has held seven meetings with an aim to complete a review of the pastoral relations policies of the United Church and present recommendations to the 41<sup>st</sup> General Council in 2012.

The steering group began its work by creating a work plan, which included the clarification of the mandate, identifying the stakeholders, and drafting a timeline, communication plan and budget.

In the fall of 2010, the group submitted its research needs to the Effective Leadership and Healthy Pastoral Relationships Collaborative Research Project. It incorporated into the project plan a report from the General Secretary approved by the Executive of the General Council called “A Future Grounded in Faith and Action,” with particular attention paid to GS29 3.(d) and 6. (simplification of pastoral relations policies; simplification of The Manual)

Values were identified and defined as lenses through which to view the ongoing work of the Steering Group: fairness, dignity, faithfulness, integrity, respect, and trust. Existing documents were also identified as lenses: Ethical Standards and Standards of Practice, Scripture, A Song of Faith (Theology), the Research Project (data), Institutional/organizational paradigms, Statement on the Meaning of Paid Accountable Ministry, and Planning for a Future Grounded in Faith and Action document. In addition, the following principles were identified as lenses: Efficacy (can it work/will it work), Cultural Lenses, Accessibility.

The next step was the classification of current policies into three types: Connecting, Supporting, and Disengaging. Current policies were reviewed with consideration of new plain language draft the Manual. Consideration was also given to the Oversight and Discipline Steering Group recommendations. Finally, the current policies were reviewed using resource, policy type, and responsibility continuums.

## Appendix A: Pastoral Relations Policy Review Steering Group Policy Recommendations

1. In the Basis of Union at section 9.2 it is stated that “as far as reasonable possible, every Pastoral Charge shall have a pastorate without interruption, and that, as far as reasonably possible, every effective member of the Order of Ministry shall have a Pastoral Charge.” This policy no longer represents the reality of the United Church, as it does not recognize the ministry of Designated Lay Ministers, of pastoral charges that function without paid accountable leadership, or of ministry personnel that serve non-pastoral charge ministries.

THEREFORE, We recommend that the policy in the basis of union at 9.2 stating that “every pastoral charge shall have a pastorate...and every effective member of the order of ministry shall have a pastoral charge” be removed, allowing for different structures and streams of ministry leadership: amalgamation, regionalization, parish models of team ministry and lay ministry leadership.

2. The term ‘pastoral relationship’ currently refers to the covenant relationship between a ministry personnel, a pastoral charge, and a presbytery. The result of this narrow definition of ‘pastoral relationship’ is that ministry personnel who serve in ministries not accountable to the presbytery are retained on the rolls of presbytery and Conference, rather than listed as members in the service of ministry. We recommend that the term *pastoral relationship* refer to the relationship between ministry personnel, the United Church, and:
  - a. Pastoral charges
  - b. Ministries accountable to the United Church( including non-pastoral charge ministries)
  - c. Ministries not accountable to the United Church such that all ministry personnel appointed, called, placed, or employed in ministry positions are members of Conference and Presbytery, and recognized as serving in active ministry roles
3. The administrative work that accompanies short term supply appointments is rarely completed before the appointment is completed. Further, ministers are often unwilling to fill short-term supply appointments and secondments because of the need to transfer their presbytery and Conference membership.

We recommend that the transfer policy be changed such that the transfer of membership of ordered ministers is optional if an appointment is twelve (12) months or less.

4. In the current context, each court has specific required committees that do not meet the needs of the proposed policy. Considering that the pastoral relations recommendations include a paid accountable staff at the Conference level, there is wisdom in the ability of each Conference to assess the new policy structure and determine how to support the responsibilities of the Conference in according to their context.

We recommend that the responsibility and authority for the implementation of pastoral relations policy be assigned to church courts, enabling the church court to establish committees or commissions to best serve their context.

5. In the current by-laws, the Settlement Committee has the authority to settle a pastoral charge that fails to extend a call by the end of the pastoral year (9.7); to ratify all calls (9.6.1); and to initiate settlements between vacant pastoral charges and members of the Order of Ministry (9.7.1). Rarely are these authorities acknowledged or lived out in the current context of the United Church.

We recommend that Settlement be removed from the polity of the United Church and that a placement process be adopted. Placement would be defined as the matching of local ministries with ministry personnel, where both ministries and ministers have applied to for placement. Ministries and ministers may apply to the Conference for placement, or to the General Council for placement. The General Council would have the authority to place and transfer at the same time.

6. And, we recommend that Conferences have the authority to transfer ordered ministers between Conferences.
7. The current by-laws define ‘vacancy’ as “the condition existing when a Pastoral Charge has received the permission of the Presbytery to seek to fill a full- or part-time ministry position as of a specific date. Such a position may be filled by the issuance of a call or through the request of the Pastoral Charge for Settlement or Presbytery Appointment.” This concept of vacancy perpetuates an historical ideology that a ministry is vacant of leadership without a paid accountable ministry personnel, and further, that the only valued ministry model is a parishand - priest-centred ministry. In order to adopt a more holistic model of ministry leadership: We recommend that the concept of ‘vacancy’ be removed from the by-laws.
8. In the current policy structure, there is an assumption that all pastoral relationships are begotten through Joint Needs Assessment and Joint Search, unless there is a requirement for Settlement. With the policy recommendations related to call and placement, the gift of choice is being given to both ministers and ministries. This may gift a renewed excitement for placement to the Church. We recommend that a local ministry with an open ministry position must choose between the call process (search and selection) and the placement process. Further, we recommend that members of the order of ministry, who are in search of a ministry position, must choose between the call process and the placement process.
9. In the current by-laws, all pastoral charges are eligible to call or appoint ministry personnel, and conditions are listed elsewhere in the by-laws as requirements for pastoral relationships. There is wisdom in compiling all of the conditions of call, appointment and placement in one place within the by-laws.

We recommend that a change be made to the policy regarding eligibility of a local ministry to issue a call or settlement, where eligibility would include:

- a. the local ministry has a ministry leadership role available to be filled
- b. the local ministry is not currently under review
- c. the local ministry is a participating in the pastoral charge payroll service
- d. the local ministry is financially viable

- i. has agreed to pay the pension assessment to the United Church pension fund, and is not currently in arrears to the fund
- ii. will not need a larger mission support grant, unless the Conference gives approval

10. In the current by-laws, all order ministers except retired order ministers are eligible for call. The eligibility of other ministry personnel is not addressed and neither are the other conditions on which the practice of ministry depends. These conditions are listed elsewhere in The Manual. There is wisdom in compiling all of the conditions of call, appointment and placement in one place within the by-laws.

We recommend that a change be made to the policy so that ministry personnel would be eligible for placement, call, or appointment, when:

- a. the ministry personnel is in good standing
- b. all currently required continuing education standards, as set by the General Council, have been met
- c. the ministry personnel agrees to uphold the Ethical Standards and Standards of Practice of The United Church of Canada in the practice of ministry
- d. the ministry personnel is willing to be a participating member of The United Church of Canada's pension and benefits plans, or another ministry's pension and benefits plans.

11. Currently the Basis of Union (at section 16.2.5-16.2.7) requires membership in the pension plan of all ministry personnel. The rules of the pension plan require a minimum of 14 hours a week of service. Further, the current by-laws allow for calls or settlements that are a minimum of 8 hours a week. To both require membership in the pension plan, and then allow for the creation of permanent pastoral relationships were membership in the pension plan in not allowed is contradictory on the part of the church. An additional challenge with the by-law that allows for a minimum 8 hour call or settlement is that movement through the salary scale requires a minimum of 750 hours of service a year. A ministry personnel must serve at least 14.4 hours a week in order to advance through the salary schedule.

We recommend that the minimum time requirement for a call or placement be increased from eight (8) hours a week to fifteen (15) hours a week. We recommend that categorization be calculated between the start date of a pastoral relationship and the anniversary date. Further we recommend that a ministry personnel serving in a part-time appointment less than 15 hours a week may receive a "year" of service after working for 750 hours, regardless of the period of time required to attain a total of 750 hours.

12. We expect that many local ministries will continue to opt for the search and selection process to call a new minister to an open ministry position. There are times when the search and selection is not successful.

We recommend that a local ministry that has chosen to call ministry personnel to an open position, and has been unsuccessful in their search, may revisit their decision, and apply for placement through the Conference.

13. Designated lay ministers currently serve in pastoral relationships on an appointment basis, which contributes to job insecurity, and restricts access to some benefits, such as the leave policies of the United Church.

We recommend that designated lay ministers who are recognized by the court of oversight may be appointed to multi-year appointments if they are filling open ministry positions (in other words, not supply appointments.)

14. In our current Church structure, we call members of the order of ministry to pastoral ministry, while at the same time, we have an expectation that a certain number of our ordered ministers will serve the Church in other capacities: in administration, teaching, outreach, chaplaincy, etc. Over their years of service, ministry personnel move between pastoral ministry and other ministry roles. However, this continuous service on behalf of the church is not reflected in the pastoral charge minimum salary and allowances policy.

We recommend that ministry personnel continue to accrue years of service credits within the Pastoral Relations system for time served in ministries that are accountable, recognized, or affiliated with the United Church, i.e., appointments to administrative service in the courts of the church, teaching positions in theological colleges, administrative positions in outreach and community ministries etc.

15. In our current structure, many of the pastoral relations processes, including but not limited to the Joint Needs Assessment Process and the Joint Search Process, rely heavily on volunteer time and capacity. The result is both volunteer burnout and the diminishment of membership within the pastoral charge. The ability of the Church to continue to operate with processes that take weeks, if not months of volunteer commitment is not feasible.

We recommend that the current Joint Needs Assessment and Joint Search processes be discontinued.

16. And:

We recommend that the church establish a policy of the regular assessment of local ministries completed by the local ministry and supported by the presbytery. The regular assessment would aim to discern the mission and ministry of the local ministry, and determine the ongoing ministry leadership required to effectively live out the mission. The ministry assessment will provide the basis for the search and selection process when a change in leadership is required.

The Oversight and Discipline Steering Group has also made a similar recommendation.

17. We recommend that regular assessments be provide to the Conference, annually.
18. We recommend that a search and selection process replace the Joint Search Committee. Further we recommend that the search and selection process be the responsibility of the governing body of the local ministry, and supported by the Conference.
19. Congregational designated ministers, while called ministers, are legally lay employees and are accountable to the governing body of the pastoral charge. In our current by-laws, the oversight and discipline of congregational designated ministers is the responsibility of the presbytery. The governing body is challenged to hold its employees to account when there is no authority for oversight.

We recommend that the policy on congregational designated ministers be removed from the by-laws, and that congregational designated ministers be lay employees for all intents and purposes, including oversight and discipline, and accountability to the governing body of the local ministry.

20. We recommend that ordered ministers retain their status as Ministry Personnel when appointed to ministry positions that may otherwise be filled by lay employees. In the event that an ordered minister feels called to a position that has been categorized as a lay employee position, i.e., Volunteer Ministries Coordinator, the ordered minister may apply to the position, but the local ministry must understand that the minister is entitled to the minimum salary and benefits for Ministry Personnel and is accountable to the Conference. If a minister applies to a lay employee position that is not ministry-related, i.e. the custodial position in a local ministry, they must request to be retained on the role as holding other employment.

We recommend that the Conference is the adjudicatory body in determining if a lay employee position, applied to by an ordered minister is “ministry.”

21. For consistency with the recommendations to move the implementation of pastoral relations policies to Conference:

We recommend that Conference train and licence Lay Worship Leaders at the recommendation of local ministries.

22. The mandate of the Pastoral Relations Steering Group included harmonization of the pastoral relations policies with the human resource policies of the General Council Office.

We recommend that further exploration be done to harmonize these two policies systems.

23. The recommendation to move the implementation of pastoral relations policy to the Conference leaves the presbytery open and available for ministry in the areas of mission, collegiality and pastoral care.

We recommend that each local ministry have an official liaison with the presbytery through a member of the presbytery. This relationship may be through the incumbent ministry

personnel serving the ministry, or through another member of the presbytery. This liaison role is distinct from those who represent the ministry as voting members of the presbytery.

24. Ministry personnel in the United Church feel most strongly connected to their local ministries. For most ministry personnel, this is their pastoral charge; however, there is a significant minority of ministers who serve in chaplaincy and community-based ministries who are asking for the recognition of their covenantal relationships, apart from the need to be related to a pastoral charge.

We recommend that the policy requiring ministry personnel to be called, appointed, or in formal association with a pastoral charge to carry out ministry be discontinued. Further, we recommend that the United Church encourage and support the establishment of innovative and missional forms and places for ministry leadership by Ministry Personnel.

25. As the United Church continues to encourage different forms of ministry:

We recommend that the United Church explore options for members of the order of ministry to participate in ministry exchanges, and other ways to temporarily serve other denominations without having to be placed on the DSL or subsequently be required to be readmitted.

## **OVERSIGHT AND DISCIPLINE POLICIES OF THE UNITED CHURCH OF CANADA**

### **1. Assumptions**

The oversight and discipline policies are based on the following assumptions:

1. Ministry personnel are called to be accountable to the church, to the local ministry in which they serve, and to themselves; they are responsible for addressing conflict and concerns within the community in which they are called to ministry.
2. Oversight and discipline of ministry personnel will be the responsibility of the Conference. There will be paid staff at the Conference level to support oversight and discipline policies and processes.
3. The purpose of oversight and discipline policies is to ensure healthy ministry personnel and healthy local ministries. They are remedial and not punitive.
4. There must be transparency in all processes for both the ministry personnel and the local ministry: its governing body and membership. Resource staff must provide information about the policies and processes that is accurate and comprehensive.
5. Oversight and discipline policies must address concerns about:
  - ministry personnel, on their fitness for ministry
  - all local ministries
  - pastoral relationships.
6. For ministry personnel, there are three aspects to capacity for ministry:
  - health
  - competency
  - suitability.
7. For local ministries, the concerns are about their:
  - knowledge of polity and policy
  - compliance with polity and policy
  - relational issues (includes abuse of power).
8. For the pastoral relationship, the concern is about the fit between the ministry personnel and the local ministry.
9. Policies and process are categorized as supportive, consultative, or formal as follows:
  - A. Supportive: They require routine action. They apply before any specific conflict or concerns arise.
  - B. Consultative: They address specific conflict or concerns through cooperative action by the governing body of the local ministry or by Conference staff and the ministry personnel rather than through a motion of the court of Conference.
  - C. Formal: They address specific conflict or concerns after consultative policies and processes have been used. They are initiated by a motion of the court of Conference.

10. Pastoral care will be provided for ministry personnel participating in any supportive, consultative, or formal oversight and discipline process.
11. Conference staff and the court of Conference, in being supportive of oversight and discipline policies, will work diligently to avoid conflicts of interest and perceptions of bias.

## **2. Supportive Policies**

### ***Background commentary***

Communication and transparency are important.

All ministry personnel are under the oversight and discipline of the court of Conference. Policies and procedures must be flexible enough for the court of Conference to adapt to all local ministry contexts.

There is an overlap between supportive accountability policies and supporting pastoral relations policies.

Supportive processes must:

- encourage respectful dialogue
- normalize conflict
- create and support healthy relationships between ministry personnel and the ministries they serve

Ministry personnel and local ministries need resources on healthy conflict. They need to know how to have healthy conversations.

### ***Policies***

1. There must be a regular assessment of the local ministry and the ministry personnel to ensure healthy pastoral relationships.
2. The presbytery is responsible for the regular assessment of the local ministry. The purpose of the assessment is for the local ministry to articulate its mission vision. This will require the local ministry to address the following questions with support from the presbytery:
  - How do we understand God's mission in the world?
  - How do we practically live out God's mission in the world?
  - What kind of ministry leadership do we need to live out the mission we have identified?

The presbytery is responsible for communicating the outcome of the assessment with the Conference.

3. The Conference is responsible for the regular assessment of the ministry personnel serving a local ministry. The purpose of the assessment is to ensure that the ministry personnel retains a sense of call to the local ministry, has the skills and gifts needed to provide leadership for

the ministry's mission vision, and retains an appropriate balance between vocational and personal life. This will require the ministry personnel to address the following questions with support from Conference staff:

- What were the joys and challenges in my ministry over the past year?
- How can I offer leadership for the congregation's mission vision for the next year?
- What skills and gifts do I need to offer that leadership?
- How will I acquire any new knowledge and skills required to offer that leadership?
- How am I ensuring that a healthy balance exists between my vocational and personal life?

### **3. Consultative policies**

#### ***Background commentary***

There needs to be a culture shift. We need to challenge our understanding of conflict as inherently bad, avoidable or unhealthy. Conflict presents an opportunity for constructive change to occur and for the participants to understand each other better.

Where there is conflict or concern about ministry personnel or local ministry, it must be:

- addressed at an early stage
- managed in a proactive way at the lowest level of escalation possible in the situation.

“One size fits all” does not work. There needs to be a tool kit for the court, committee or appropriate staff with responsibility to respond. It must contain different options to fit various contexts.

Role clarity is important for the courts, committees and staff involved in the consultative processes.

Each of these must understand their particular responsibilities in the processes, and know of the responsibilities held by the other courts.

#### ***Policies***

1. The governing body of the local ministry is responsible for responding to concerns within the local ministry. It must determine the appropriate response based on the nature of the conflict and the options available to address it.
2. The Ministry and Personnel Committee, or equivalent, is responsible for working with the governing body in being aware of, and responding to concerns within the local ministry.
3. The General Council office is responsible for providing necessary resources for the governing body and Ministry and Personnel Committee. The Conference is responsible for supporting the policy and processes.

*NOTE: There is an exception to the above policies. All concerns and complaints about sexual abuse and harassment must be dealt with under the Sexual Abuse Prevention and Response Policy and Procedures.*

4. If the governing body cannot address the concerns to its own satisfaction or the satisfaction of those involved in a conflict, the Conference is responsible for responding.
5. The Conference may hear and respond to concerns from any source. Concerns may be communicated to the Conference by any means, from a formal proposal to an informal conversation with Conference staff. Concerns may come to light out of the regular assessment of the ministry personnel. Information may also come from the presbytery, perhaps based on the regular assessment of the local ministry.
6. At the consultative stage, the Conference responds through its staff. No formal court motion is required. The response will depend on the nature of the conflict and the options available to address it. Through the consultative stage, the ministry personnel and the local ministry are pastorally supported by the presbytery. Collegial support of the ministry personnel is also the responsibility of ministry personnel who are members of the presbytery.

Staff must ensure they have an adequate understanding of the concern and the local context in which it arose before suggesting a particular option. There are options for information gathering and resolution which include, but are not limited to:

- a listening team to hear, but not act on, the concerns of the people involved
- a Conflict Resolution Facilitator to work with the people involved to explore a resolution
- individual or small group conversations facilitated in other ways
- assistance from Conference staff or a Conference committee/commission with expertise in the subject matter of the concern
- taking no further action at this time
- an assessment [see 7 below]

7. An assessment is an informal process in which the Conference staff makes inquiries into the situation to gain the information needed to determine appropriate next steps. The Conference staff conducts an assessment if:

1. The Conference staff considers an assessment to be the appropriate response to concerns about ministry personnel, a local ministry or a pastoral relationship [see 6 above].
- or
2. Other options for responding to concerns have been used [see 6 above] but have not resolved the concerns.

8. The outcome of the assessment depends on the information determined through the assessment.
  - A. If it appears the ministry personnel is ill, the next step may be for the Conference staff to support the ministry personnel in arranging for a medical assessment and restorative care, with the co-operation of the ministry personnel. No court motion is required.
  - B. If there is another concern (i.e. not illness) about the ministry personnel, the next step may be for the Conference staff to support the ministry personnel in doing particular remedial work as agreed upon by the Conference staff and the ministry personnel. No court motion is required.
  - C. The Conference staff may also report the results of the assessment to the Conference Executive or Sub-Executive and recommend that it initiate a review. The Conference staff must name the focus of the review [see **Formal Policies, Policies - 1**]. The recommendation will lead to a court motion. The Conference staff must also recommend whether it is necessary for the ministry personnel to be on leave during the review process.

#### **4. Formal policies**

##### ***Background commentary***

If concerns are not resolved through consultative processes, the formal processes may be followed. A key difference between consultative and formal processes is that a formal process must be authorized by motion of the Conference [Executive or Sub-Executive]. A consultative process may be initiated and completed by the governing body of a local ministry, or Conference staff.

##### ***Policies***

- A. The Conference takes formal action in oversight and discipline matters through its Executive or Sub-Executive. It does not act through the full court.
- B. The Conference may decide to initiate a review on the recommendation of the Conference staff or in other case where the Conference considers it appropriate. The Conference must specify the focus of the review, and there may be more than one focus. The options are:
  - A. Ministry personnel's capacity for ministry - this applies where there is concern about the ministry personnel's health, competency, or suitability for ministry.
  - B. Local Ministry - this applies where there is concern that the congregation or other local ministry:
    - lacks knowledge about United Church Polity or policies
    - is not in compliance with United Church Polity or policies
    - has relational issues within the local ministry, or between the local ministry and a court or other body
  - C. Pastoral relationship - this applies where there is concern about the fit between the ministry personnel and local ministry.

- C. The Conference may decide to take a different action than the one recommended by the Conference staff, or to take action even if there has been no recommendation from the Conference staff. The options are:
- to initiate a review with some other focus than recommended by the Conference staff
  - to initiate some kind of action other than a review (*Note: the options would include the one listed under section 6 of Informal Processes and a formal hearing*)
  - to take no action.
- D. A review must be conducted by an investigator from a different presbytery. The investigator may serve on a voluntary or for fee basis, as determined by the court and the investigator.
- E. The presbytery is responsible for pastoral care of the ministry personnel and local ministry throughout all formal processes, including any assessments or remedial work ordered as the outcome of a formal process.
- F. The reviewer must report to the Conference with both:
- a conclusion about each concern named as a focus of the review; and
  - one or more recommendations that are based on the conclusion(s).
- G. The options for recommendations by the reviewer are:
- a professional assessment. This may be a vocational or medical assessment, or it may be for the purpose of determining the appropriate remedial work for the ministry personnel.
  - remedial work. This may be any education, counselling or other form of remedial work for the purpose of improving the fitness for ministry of the ministry personnel or the health of the local ministry. The Conference must specify the particular remedial work, or specify a process for deciding on the particular remedial work.
  - ending of the pastoral relationship.
  - Discontinued Service List (Disciplinary). The reviewer may recommend that the ministry personnel's name be placed on the DSL (Disciplinary).
  - suspension. The reviewer may recommend that the ministry personnel be suspended for a specified period if the reviewer has also made one of the other recommendations listed above.
- H. The Conference must make a decision on the recommendations. It may:
- accept one, some or all of the recommendations
  - take different action than that/those recommended
  - take no action.
- I. When the ministry personnel has completed any remedial work ordered, the Conference must decide if the ministry personnel has made satisfactory progress.
- if satisfactory progress: the ministry personnel is free to seek a call or appointment or, if under suspension from an existing call or appointment, to return to it.
  - if unsatisfactory progress: the Conference has three options:

- a) ordering a formal hearing to consider whether the ministry personnel's name should be placed on the DSL (Disciplinary)
  - b) extending the time for the ministry personnel to complete the remedial work
  - c) ordering additional remedial work.
- J. A ministry personnel who is under review is not eligible for call or appointment until the review is completed and the Conference has made a decision on the recommendations from the review.
- K. Ministry personnel may request that their name be placed on the Discontinued Service List (Voluntary). A person whose name is on the DSL (Disciplinary) or DSL (Voluntary) is not recognized as United Church ministry personnel and may not function in any area of ministry. *[Note: this is a change from the current policy. Currently, the Conference may decide to allow a person on the DSL (Voluntary) to continue functioning in areas of ministry specified by the Conference.]*
- L. A ministry personnel is entitled to a formal hearing or process with similar legal safeguards before their name may be placed on the DSL (Disciplinary). *[Note: a review is not adequate for a "process with similar legal safeguards".]*
- M. The existing rules for formal hearings will continue to apply, with the following changes:
- A. The notice of the hearing sent to the parties must specify that if a party does not attend the formal hearing, the formal hearing may proceed in their absence. *[Note: this would ensure that a party understands the consequences of not attending the formal hearing.]*
  - B. The formal hearing committee has the authority:
    - to define the issues to be determined in the formal hearing, within the mandate given to it by the court
    - to determine how evidence will be received, including through witnesses in person, affidavits or agreed statements of fact
    - to limit the time for cross-examination
    - to add parties to the formal hearing and to determine the nature and extent of their participation in the formal hearing.
- [Note: these are the kinds of powers that secular administrative tribunals have by statute, and a formal hearing committee is similar to a secular administrative tribunal. These powers would give a formal hearing committee more control over the process so that the formal hearing would be more focused and fairer to all parties.]*

- C. Evidence (from live witnesses or through documents or reports) may be admitted if it is relevant to the issues in dispute, and it is fair to admit it. *[Note: this is the test used for administrative tribunal hearings. It is less onerous than the test set out in The Manual, which is for civil court proceedings. A formal hearing is more like an administrative tribunal than a civil court proceeding.]*
- D. There is no longer a requirement that a verbatim (“word-for-word”) record be kept of the formal hearing. The hearing may be recorded. *[Note: recording the hearing is not a requirement for most administrative tribunal proceedings, where adjudicators rely on their own notes].*
- E. A copy of all formal hearing decisions must be forwarded to and kept by the legal counsel in the General Council Office. The decisions would be available as to any party who will be taking part in a formal hearing. *[Note: The Manual provides that courts are not bound by past decisions but for matters of discipline in formal hearings and appeal hearings, following precedents is important for fairness and consistency.]*
- F. “Rebuke” and “admonition” are removed as possible outcomes of a formal hearing. The range of other options would be as under the present Manual. There would be a “catch-all” provision added entitling the formal hearing committee to make any other disposition that is just, and that is within the authority of the court that appointed the formal hearing committee. *[Note: This addition would allow the formal hearing committee to craft a remedial solution to suit the particular situation as long as it is fair and within the court’s power.]*
- G. The General Council office (through its legal counsel) will maintain a pool of ministry personnel and lay people who have the training and experience to serve as members of formal hearing committees, and to do this work well. A person may be included in the pool only with the support of their Conference. When a court appoints a formal hearing committee, all the members must be drawn from this pool. *[Note: the goal here is to achieve greater expertise and consistency in formal hearings.]*
- N. The existing rules for appeals will continue to apply, with the following changes:
  - A. The appeal committee has the authority to add parties to the appeal and determine the nature and extent of their participation in the appeal hearing.
  - B. A court has authority to make decisions within its area of responsibility, and this decision-making authority must be respected. The purpose of an appeal is not to re-hear the the matter and to make a new decision on it in the place of the court (or formal hearing committee). Rather, it is to review the original decision to determine whether:
    - the court (or formal hearing committee) acted within its authority and United Church Polity in making the decision

- there were procedural errors in the process to the extent that the original decision cannot be considered fair and just.
- C. Witnesses or other new evidence is not permitted. The appeal must be decided on the basis of the record from the lower court i.e. the documents and other evidence that it considered, and the decision that it made.
- D. The General Council office (through its legal counsel) will maintain a pool of ministry personnel and lay people who have the training and experience to serve as members of appeal committees, and to do this work well. A person may be included in the pool only with the support of their Conference. When a court appoints an appeal committee, all the members must be drawn from this pool. [*Note: the goal here is to achieve greater expertise and consistency in appeal hearings.*]

## **REPORT OF THE GENERAL COUNCIL TASK GROUP ON SIMPLIFYING POLICIES AND PROCEDURES RELATED TO PASTORAL RELATIONS**

### **Summary of Task Group Report**

The mandate defined by the 37th General Council was to establish a Task Group to explore options for simplifying the policies and procedures relating to Pastoral Relations, Ministry Vocations and Pastoral Oversight and to consider the potential move to a three court system.

The Task Group quickly concluded that the processes are not easily simplified because of geographic diversity (from rural, sparsely populated and isolated areas to densely populated urban areas) and the need for checks and balances. However, processes may be clarified and made easier to follow which ultimately will lead to simplification. Many of the recommendations coming out of this study time are for the purposes of clarifying the processes. Some of the changes are substantive.

The report comes in seven parts:

- Introduction;
- Discernment, Interviews and Educational Issues (with 8 motions for action arising);
- Pastoral Oversight (with 8 motions for action arising);
- Procedures for Appointments and Calls (with 6 motions arising);
- Ending of Pastoral Relationships (with 4 motions arising);
- General Recommendations (with 8 motions arising);
- Appendices give additional information.

Beyond the areas of church work related to education, oversight and pastoral relationships, these recommendations, if adopted, would have a significant impact on *The Manual* of The United Church of Canada as it presently exists. The purpose of the suggested changes to *The Manual* is to make it a more accessible resource to all of the people of the church, particularly in the area of Pastoral Relations.

The underlying theological assumption of the Task Group is that the Church exists for the sake of God's people and God's world and that resources produced by the Church must be a means by which wholeness can be brought about. The Task Group also endeavored to model a way of being the Church that is open, consultative and collegial in our relationships.

The goal of the Task Group, in addition to what has been mentioned above, was also to see that the Church provides policies and procedures for all its Members that are effective, just and accountable. These goals are lived out by enabling Ministry Personnel to have the spiritual and pastoral training and ethical discernment needed to minister in the contemporary Church. We also seek fair employment practices and clear covenant relationships so that all may carry out God's mission in the world. Embedded in this goal is the need to ensure proper checks and balances for accountability, and to provide for advocacy for those in the Church who have traditionally been marginalized. Last, but not least, we seek to celebrate the gifts for administration and governance which the Church needs in order to fulfill its mission.

The Task Group worked under somewhat difficult and limiting circumstances. The difficulties included a short time line for complex issues, enormous changes in church structures, several remits that affected this work, and changes in staff. Nevertheless, it has been an important process the results of which are now being offered to the wider church for consideration.

## **Background**

### ***Organizing Principle***

The material is presented by function (education, oversight, appointments, endings, and general) rather than by courts of the church as in the current edition of *The Manual*. The pattern for each section is to outline current practices, name recommendations, and describe how this simplifies.

### ***Definitions***

The following definitions may assist you in reading the report.

**Polity:** form and practice of governance. The governance of The United Church of Canada is conciliar.

**Conciliar:** governed by councils. The polity of The United Church of Canada is based on a four Court system, that is, Pastoral Charge, Presbytery, Conference and General Council. Each council has specific responsibilities and works together with the other councils for the effective functioning of the whole church.

**Episcopal:** responsibility for oversight, care and accountability of one body for another with the well-being of the whole church in mind. In the United Church, Presbytery has an episcopal function in relation to Pastoral Charges within its bounds, that is, has responsibility to offer spiritual and practical assistance and oversight to Congregations and to uphold the ethos and polity of The United Church of Canada.

**Volunteer/Elected Member:** The United Church is currently moving toward use of the term “elected member” to describe those persons elected by a court of the church to do committee or task group work. Both lay and ordered people serve committees at every Court of the church as elected members.

### ***Mandate of Task Group***

To review the current policies and procedures relating to Pastoral Relations, including Pastoral Oversight, and Ministry Vocations, explore options to simplify these, and present to the 38<sup>th</sup> General Council a report with proposals for simplified policies and procedures the task group deems appropriate for The United Church of Canada.

As well, the Task Group needs to look at the implications of moving from a four-court system to a three court system.

### ***Theological Perspective***

This Task Group believes that:

- God acts in the world.
- The church responds to God’s actions in the world. The church does not exist for itself but rather for the sake of God’s world.

### ***What Then Does It Mean To Be Church?***

The church must be mission driven, that is, to keep its eyes on God's call to seek justice, love kindness and walk humbly with God.

Doing this means a church that:

- Models respectful community and just relationships.
- Acts collegially.
- Offers faith nurture, that is, engages in faith development focussing in congregations.
- Connects to other Christians locally, across the country and around the world.

### ***Purpose of Pastoral Relations, Pastoral Oversight and Ministry Vocations in The United Church of Canada***

The purpose of Pastoral Relations, Pastoral Oversight and Ministry Vocations in The United Church of Canada is to provide simple, effective, transparent, just and accountable policies for educational, oversight and employment practices for Ministry Personnel

- That enable Ministry Personnel to have the biblical, theological and historical insights, and the skills in pastoral practice and ethical discernment and decision making needed in the contemporary church through adequate preparation for ministry service in The United Church of Canada.
- That enable fair employment practices so that Ministry Personnel and Congregations can be free to focus their energies on God's mission in the community and world.
- That offer appropriate oversight, checks and balances for a national and conciliar system.
- That offer advocacy for traditionally marginalized groups within the United Church.
- That promote respect, trust and collegiality.
- That celebrate gifts of leadership in administration and governance.

### ***Process Used By the Task Group***

The Task Group began by learning. The General Council recommended that some people with current involvement in the Division of Ministry Personnel and Education be appointed to the Task Group. However the General Council Executive decided to name people not currently involved in Ministry Personnel and Education committees of the church. Their hope was to minimize the "we've always done it this way" biases and maximize creative new proposals. However, this meant a high learning curve for many Task Group members unfamiliar with the complex policies of the church.

The Task Group began by examining current structures, policies and procedures according to *The Manual*.

The Task Group spent some of its time considering how the episcopal functions of the church can be effectively performed, exploring simplification and the need for checks and balances. Two major rounds of consultation were held. The first involved a questionnaire sent to Presbytery, Conference and General Council Committees involved in the work of Pastoral Relations, Oversight and Ministry Vocations. After the results of those surveys were analyzed, the Committee held consultations with selected groups of individuals involved in common work (e.g. serving on Education and Students Committees of Presbyteries, serving on Conference Pastoral Relations Committees) from across the country. The limited time frame for work prior

to General Council meant that a hoped-for third round of formal consultations was not held, although informal feedback was requested and received from individuals and from the General Council Pastoral Relations and Ministry Vocations Committees.

Collecting Ministry Personnel and Education resources proved to be a difficult process.

In pulling out themes and addressing them in specific terms, we chose to focus on the concrete practical issues in the ministry personnel and education system rather than on theologies of church or ministry. The recommendations that we present for changes to the system are minimal. **We believe that a few achievable changes can simplify policies and procedures more effectively than requiring people to learn whole new systems.** A message that came through loudly and clearly from the consultations was to keep the procedures the same for long enough for volunteers/elected members to learn them and implement them effectively instead of always having to learn new policies and procedures and terminology.

We did considerable work on what it would mean to move to a three Court system, but prior to our final meeting we learned that the remit about moving to a three Court system had failed. Thus we have not included any of our recommendations related to a three Court system. In several places we recommend directions for the church, but recognize that General Council Committees will have to follow up on the specific details for implementation. We have tried to include which Committees should do the follow up but because of the changes occurring in the national structures, some adjustments may need to be made.

We have identified costs as nearly as we can predict them at this point. We have not included the line in our motions regarding **sources of funds** although in some cases we have suggested reallocation of current dollar usage. **As a General Council Task Group (rather than a group related to a Unit), we assume that the General Council is responsible for allocating funds to fulfill the work accepted out of this report.** We also want to encourage General Council not only to ask the question “How much will this cost to do?”, but also “What will be the cost of not doing this?” Good stewardship of volunteer time, energy and travel are essential. Proactive work and education cost money, but frustrated volunteers, wasted time, and lawsuits cost more. Also, we have sought to be aware of who pays the costs. Some feedback suggested downloading costs from the national to regional church, but we have tried to explore costs to each Court of the church in our consideration of stewardship.

In order for the Task Group to analyze problems and evaluate alternative solutions we needed criteria. The criteria we decided to use were as follows:

- What is the process?
- What is involved and why?
- What is not essential?
- Who will benefit and who will pay the costs of any changes?
- What is essential in the policies, processes and procedures to achieve:
  - Simplicity?
  - Efficiency and effectiveness?
  - Practicality?
  - Consistency?

- Justice, compassion, respect for diversity, inclusivity?
- Accountability?

Since one of the mandates of the task Group was to simplify the church's policies, processes and procedures the task group developed the following characteristics in relation to simplicity:

- Clear policies, processes and procedures need to be presented in an accessible and consistent manner with appropriate training available.
- The church needs to take a proactive stance so that a disproportionate amount of time and energy are not devoted to cleaning up messes.
- Although some checks and balances are needed, duplication of role and function is not.
- Policies, processes and procedures need to be transparent.
- It needs to be recognized that everything cannot be changed and therefore it is important to focus on urgent and achievable changes.
- 

### ***Problems Identified Through Consultations***

#### Geography

- high cost for travel and consultation
- distances in and size of many rural presbyteries
- regional distinctiveness

#### Church membership, volunteering and training

- declining participation in Church
- difficult to have a conciliar church with fewer people
- insufficient volunteers
- lack of training and support for volunteers

#### Church vision, communication and structure

- many people see the church as seeking structural solutions to all problems
- people are often not aware of policies, procedures, and processes
- people do not know what *The Manual* is and how to use it
- many congregational members see work in the wider Courts of the church as a bother
- many people who do work in various Courts of the church have concern about the number of committees required and the multitude of forms required in many processes
- concern was expressed about the effectiveness of Presbyteries which do not always provide leadership, know what they are doing or create relationships of trust with Congregations

#### Pastoral Relations

- Change in timing of congregational meetings to require two weeks plus a day instead of two weeks is problematic for many Pastoral Charges.
- The need for fewer and simpler, user-friendly forms that are not always changing. Clarity about how particular forms fit into the process, how they are supposed to be filled in and which ones are needed at each stage (on a flowchart)
- How hands-on does the role of Presbytery need to be? What can be done by phone, fax and email? What forms need actual signature and which can have faxed signatures?

- Slowness of some processes and rapidity of other changes. (e.g. Needs Assessment may take a long time, but it often seems people have just learned one policy or procedure and it changes.)

#### Oversight

- the ineffectiveness of the current Oversight procedure, lack of clarity of Oversight's relationship with Pastoral Relations and Discipline, and the lack of a national staff person related to oversight
- being nice is not enough
- how to call ineffective or destructive ministers to account rather than simply transferring them to another area
- issues of confidentiality and accountability need to be more clearly outlined

#### Ministry Vocations

- Congregation members and people new to Education and Students Committees are often confused by the variety of Ministry Personnel in the church.
- A very large number of concerns about Staff Associates were raised regarding appointment procedures, interviews, training, etc.
- Congregational appointments are a frustration to many
- Length of membership in the United Church prior to Discernment or employment was raised as an issue.

A detailed listing of the full range of problems identified in the consultations appears in Appendix A.

The resolutions presented by the task group can be grouped into five topic areas:

1. Discernment, interviews and educational issues: Resolutions 52-56.
2. Oversight: Resolutions 57-66
3. Pastoral relations: Resolutions 67-71
4. Ending pastoral relationships Resolutions 72-75
5. General recommendations: Resolutions 76-82.

#### **Appendices**

Appendix A: Problems Identified (page C-51)

Appendix B: Current Procedures Discernment, Interviews and Educational Issues (page C-56)

Appendix C: Oversight Functions within the Church (page C-60)

Appendix D: Current Procedures for Appointments and Calls (page C-62)

Appendix E: Current Procedures for Ending Pastoral Relationships (page C-65)

Appendix F: Resources Used for Task Group Work (page C-67)

Appendix G: Task Group Members and Meetings (page C-68)

**Future Concerns beyond this Committee**

1. Need to address economic disparity of doing work of church. Many Presbyteries use a very high proportion of their budget for travel and have no resources for education and proactive work for positive mission and ministry. There need to be geographical alternatives for remote communities to do the work of pastoral relations, oversight and ministry vocations more effectively.
2. Need processes to address the shortage of ministry personnel in some areas of the church.
3. Translation of policies and procedures into the many languages represented in the United Church including those of francophone members, people of All Native Circle Conference, and participants in the work of Ethnic Ministries.
4. Enable communication among the various courts of the church.
5. Need to find ways to deal with people who should not be in ministry in the United Church. Currently candidates may be shuffled through the system and ministers who are ineffectual or destructive are often moved from one place to another without anyone addressing the problems.
6. We were also informed that the best resources are not print resources but rather: experienced colleagues; competent personnel ministers; responsible Presbytery Executives who are willing to deal with hard issues; along with common sense and comfort with bureaucracy. How do we maximize use of these people and resources for the well-being of the church?

## **Appendix A: Problems Identified**

The Task Group heard a number of concerns from across the church.

### ***Geography***

The vastness of the country, the driving distances involved for many people doing church work, the enormity of travel costs, and regional distinctiveness.

Severe shortage of ministry personnel in some areas, and very high turnover in others.

Concern that a three court system will just add to the hours of travel and the costs.

Processes are not standard across country—we need flexibility for regional differences but people moving from one area to another have to learn how things are done there.

### ***Uncertainty about a vision for The United Church of Canada***

Many people see the church (especially at its General Council level) as seeking structural solutions to all problems (personnel problems, faith problems, demographic changes, etc.).

Low morale exists in many places.

Lack of trust and collegiality among people in various courts of the church, including among ministry personnel, and between ministry personnel and lay members of the church.

### ***Shrinking numbers of people involved in churches***

In some cases this leads to church closures, amalgamations or reorganizations.

Concern for viability of part-time positions for Ministry Personnel who need full-time employment.

Too few people to fill all the committees our church has created. The United Church is a conciliar church. It values its diverse voices and its collective wisdom found through our church councils. Alone we do not know as much of God's wisdom as we discover together. So we need people! But we need better ways to be a conciliar church with fewer people.

### ***Concerns about volunteering***

Lack of training for volunteers. The church does not train people for many of the jobs they are asked to do and does not give most new committee members job descriptions of what they are being asked to do. Many competent people will volunteer for organizations that give positive training and clarity about responsibilities and accountability rather than volunteering for groups that leave them on their own to figure out what to do.

Lack of support for volunteers. Often lines of accountability are unclear, no one conducts performance reviews and accountability sessions with volunteers in ways that are supportive, directive and helpful in providing affirmation, thanks, criticism and assistance in problem solving.

Insufficient volunteers to staff required committees (especially Joint Needs Assessment and Search Committees and Discernment Committees).

Many processes are too labour intensive. This problem is especially severe in All Native Circle Conference, but is expressed in all conferences.

Fear of litigation.

High turnover of volunteers.

### ***Training***

As funding has decreased for church work, fewer resources have gone into leadership development and resource production.

Many Presbyteries use all their energy dealing with crises rather than training people to do the work of the church.

Those people who have been educated for their jobs frequently speak highly about the processes in place and feel much more positive about carrying out their roles than those who have not received training for their work in Pastoral Relations, Oversight and Ministry

Vocations/Education and Students.

Concern that people need to know what they are expected to do, what its function is and what requirements are essential.

Several people said that better training for committee work will lead to simplification because people will follow procedures correctly and understand why things need to happen and thus will minimize things needing to be redone or energy spent in hearings, court, etc. Specifically we heard of the need for training for people in congregations who work on Joint Needs Assessment Committees, Joint Search Committees, Discernment Committees, Lay Supervision Teams, Ministry and Personnel Committees, Appointment Advisory Committees. At Presbytery level training is needed for those who are representatives to Joint Needs Assessment Committees, Joint Search Committees, Discernment Committees, Pastoral Relations Committees, Education and Students Committees, those working with Sexual Abuse Policies and Procedures, and Oversight Committees.

### ***Communication***

People are often not aware of policies, do not know how to get help, are unfamiliar with resources available, do not know what forms are used for what reasons, feel that the national church makes confusing decisions.

Changes in policies or practices are often not known by local people confronted by problems. Information must be accessible, easily updated, and provide places to go with questions or for consultation.

*The Manual* and resources materials are not translated to reflect the multi-linguistic reality of the United Church.

The Commission Report, *A Call to the Table* (August 21, 2002) discusses the problems existent in the General Council offices of the United Church of Canada. However, we heard that many of these same problems dwell in other courts of the church. They and we found a clear lack of trust sustained by “rumour-mongering and speculation about decisions that have been made after faithful debate and the consideration of everyone’s best interests; hallway whisperings that undermine confidence, integrity and morale; persistent suspicion about people’s hidden agendas and the impugning of their credibility; a wholesale sense of ‘entitlement’ that decrees one’s job or program to be untouchable; a belief that if people hold other opinions, they just ‘don’t get it’ or ‘can’t see outside the box’; the sense that one’s work is being trashed by others; cynicism; overuse of email in place of face-to-face discussion; using ‘who you know’ to get results rather than due process; lack of vision; active avoidance which boils over into uncontrolled anger; absence of apologies; unseemly ambition; the defeat of goodwill; the loss of accountability and team spirit; work overload, burnout, withdrawal, giving up.

‘Trust’, the force that binds us and holds us together as a community, has been shattered.”  
(p. 1-2)

### ***Structure***

Many congregation members see work in the wider courts of the church as a bother irrelevant to their Christian faith.

Many people who do work in the various courts of the church have concern about the number of committees required, and about the multitude of forms required in many processes.

With shrinking numbers and budgets, more Pastoral Charges hire part-time personnel who may devote less time to work beyond the Pastoral Charge than full-time personnel have in the past.

Concerns were expressed about moves toward congregationalism in the United Church.

Concern is expressed about the effectiveness of Presbyteries which do not always provide leadership, know what they are doing, or create relationships of trust with congregations. The complexity of processes and high learning curve for people new to the system

### ***Uncertainty about future governance of The United Church***

Many people want church structures to remain the same (a four court system, viable congregations served by ministry personnel, national staff related to specific portfolios of work, etc.) Many others want change (e.g. a three court system, more congregational autonomy, congregational renewal movements, decentralized and fewer staff beyond the local congregations.)

Some suggest that if we have a will for the mission of the church, we will follow it no matter what the structures are. Others desire stronger leadership from the national church.

Some people favour a ministry personnel system focussing on call, vocation and mission. Others favour a model focussing on job performance, hiring and firing, and legal employment

requirements. Questions exist about how Ministry Personnel and Education functions and policies might be integrated with Human Resources functions and policies and some question the wisdom of joining them in any way. The tension between the Human Resources and Pastoral relations systems play out in various ways in the church.

Some wonder about whether Education and Students Committees and Theological Schools are addressing the right issues and content to keep in touch with the church as it has changed.

Some express fear about the loss of identity of the United Church and about what the Residential School settlements will mean to the church.

Some think that most changes in the United Church reflect a “bigger is better” philosophy.

Some state strongly that we need never to abandon things that protect the church and individuals; some justice issues get addressed only because we make them get addressed. Some fear that we cannot, or will not, live up to the Vision Statement adopted by the General Council Executive in November 2000 which says “We seek to be a church that is committed to:

- Living whole-world ecumenism,
- Nurturing visible unity in the Body of Christ,
- Overcoming structural racism,
- Seeking gender-justice,
- Being affirming and inclusive,
- Ensuring participation of all ages,
- And removing structural obstacles that impede us from working effectively together in mission.”

### ***The Manual***

People often do not know what it is or how to use it. Many find it uses too much jargon.

The lay-out is complex, meaning people need to jump from place to place to find the next step with no help from flow charts or other tools.

### ***Being nice is not enough.***

As a liberal church the United Church has valued getting along and being nice, good and kind. The inability of the church to deal with harsh, painful and destructive realities within the church itself means the church tends to put all its energy into trying to make things “OK.”

We tend to develop global policies to fix things rather than dealing with a specific problem.

Personnel matters are frequently dealt with quietly, meaning personnel may move on with no accountability for inappropriate or destructive behaviours.

Inappropriate candidates are allowed be ordained, commissioned, designated or appointed to work as ministry personnel in the church because everyone gives the benefit of the doubt.

The tendency toward nice means a few people who love drama and firefighting rush about trying to fix things while most of the church naively avoids the conflicts in the church.

Many congregations do not want to admit something is wrong in their Charge.

Problems must be dealt with early rather than allowed to fester. Training, information-sharing and dealing with concerns and issues must be anticipatory rather than crisis-oriented and responsive.

The Commission Report, *A Call to the Table*, puts a consequence of being nice this way: “The Commission repeatedly encountered instances of what we came to refer to as the ‘common church trap’ (or CCT). The CCT is a series of leaps of analysis that are triggered by a worthy concern for the health and well-being of other members of the family, which may occur without rational analysis, and without a full consideration of the implications of the actions which can follow. The CCT follows upon a person declaring that (s)he feels hurt by some action or decision; other persons or a body conclude that if the person *feels* hurt, then they must *be* hurt; if they are hurt, there *must* have been an injustice or bad decision; if there has been an injustice, then action must be taken to remedy the injustice. But it is possible there has not been an injustice. The appropriate response may be to respect the decision, and to focus on pastoral care for those who are affected adversely, or otherwise feel aggrieved.” (p.10)

#### ***Number of ministry streams and avenues into them***

Congregation members and people new to Education and Students Committees are often confused by the variety of ministry personnel in the church.

A very large number of concerns about Staff Associates were raised regarding appointment procedures, interviews, training, etc.

Congregational accountable ministers with no accountability beyond the local church are a frustration to many.

It was noted that there is inconsistency regarding length of membership in the United Church prior to Discernment or employment.

#### ***Ministry Personnel and Education Policies and procedures***

Change in timing of congregational meetings to require two weeks plus a day instead of two weeks is problematic for many Pastoral Charges.

The need for fewer and more simple, user-friendly forms that are not always changing. Clarity about how particular forms fit into the process, how they are supposed to be filled in and which ones are needed at each stage (on a flowchart)

How hands-on does the role of Presbytery need to be? What can be done by phone, fax and email? What forms need actual signature and which can have faxed signatures?

Slowness of some processes and rapidness of other changes. (e.g. Needs Assessment may take a long time, but it often seems people have just learned one policy or procedure and it changes.)

***Oversight***

The ineffectiveness of the current Oversight procedures, unclarity of Oversight's relationships with Pastoral Relations and discipline, and lack of national staff related to Oversight.

***Accountability***

Issues of confidentiality and accountability need to be more clearly outlined.

How to call ineffective or destructive ministers to account rather than simply transferring them to another area.

Concern about whether the system has/will have adequate advocacy roles and resources.

The Report on the Changing Church at the 37<sup>th</sup> General Council recommended "that the current ambiguity concerning accountability of Ministry Personnel be clarified and that accountability (including care, oversight and discipline of ministry Personnel) be more clearly the responsibility of a single body." (p. 42/ 256)

- Along with the problems identified by those consulted, we as a Task Group noted the issue of too much change happening too quickly. The Task Group was hampered significantly in achieving its mandate by the magnitude of the decisions of the last General Council. The uncertainty about whether the church will have three courts or four, the changing of all the structures of the General Council offices in ways that have divided the work in the mandate of this Task Group (education and pastoral relations) and have left us very uncertain about where things will fit (if at all in the new structure), the remits regarding the Unified Placement Process, and Designated Lay Ministries have major implications for the work assigned to this Task Group, the lack of current Ministry Personnel and Education representation on the Task Group limited knowledge of current polices and led to more work than necessary, changes in staff to the Task Group and of membership on the Task Group, and the multitude of changes in the congregations, Pastoral Charges, Presbyteries, Conferences and church institutions to which we relate all made the task complex. We can say in conclusion that the current church is undergoing a hurricane of changes.

These concerns are far reaching. Many of the issues raised here are beyond the scope of this Task Group to deal with. No one small report can bring about a changed culture to re-build an atmosphere of trust and hope. However, we have tried to address the issues relevant to the narrow areas of our mandate. We also believe that the United Church must find ways to address all of the issues named if it is to be a faith-oriented and mission-focused church.

## **Appendix B: Current Procedures - Discernment, Interviews and Educational Issues**

### ***Outline of Current Procedures***

#### 1. Ordained Ministers

- a. Function – Word Sacrament and Pastoral Care
- b. Education –
  - i. A Bachelor’s level degree, enrol at UCC recognized school or program for three year program of preparation for ministry, normally leading to M.Div. or B.D. degree and testamur. (720, 726, 727, 729) or
  - ii. Authorization by the Presbytery and Shorter Course Committee to enrol in testamur program. (723), enrol at UCC recognized school or program for three-year program of preparation for ministry, normally leading to M.Div. or B.D. degree and testamur. (720, 726, 727, 729) or
  - iii. Admission to UCC Native Ministry Theological Centre, with five-year program and testamur. (720)
  - iv. Internship or equivalent in Community Based program.
- c. Requirements – active member of UCC for at least 24 months, current close association with UCC Congregation, willing to meet with Discernment Committee to have call tested, be recognized by local church and Presbytery as Inquirer. (022(b))
- d. Application – By person who believes they have a call to ministry. Approach Clerk of Session or Secretary of Board of Congregation asking to be recognized as Inquirer. (022(a))
- e. Process
  - i. Session decides re-request from individual to become Inquirer. (022(c))
  - ii. Discernment Committee established with Congregation and Presbytery members to meet with Inquirer over 12 months to determine suitability for ministry, with Presbytery oversight of process. (022(d)(e)(f)(g))
  - iii. Presbytery reports to Conference all Inquirers under its care (022(h))
  - iv. Discernment Committee recommends to Session or Church Board about Inquirer’s suitability for Candidacy for ministry, and report to Presbytery (022(i))
  - v. Presbytery Education and Students Committee arranges interview with Conference Interview Board. (022(j)).
  - vi. Education and Students receives Interview Board report, Discernment Committee report, Session or Church Board report, and application and police check from Inquirer; interviews Inquirer and recommends to Presbytery whether Inquirer should become Candidate (022(k), 346)
  - vii. After informing Inquirer of requirements regarding pension fund and Transfer and Settlement, Presbytery decides whether or not to receive

applicant as Candidate (022(l)(m)), communicates to Candidate, Congregation, and General Council unit (022(m)) and, if Inquirer made Candidate, Covenanting Service and dissolution of Discernment Committee.

- viii. Presbytery to supervise Candidacy including annual interview regarding call and fitness and certify to and receive report from theological school. (024) Approve application for internship and evaluate successful completion of internship (024(d), 722, 466( b)). R eports annually to Conference. (024) (382(b)(c))
- ix. Application for ordination to Presbytery E & S. Interview. Theological School testamur. C onference E&S interview regarding readiness (462(a)ii,iii,iv). Ordination can take place if criteria met and settlement placement available. (027, 424(b))
- f. Designation – Ordained Minister--Conference ordains to Ministry of Word, Sacrament and Pastoral Care (028, 424(a)(c))

## 2. Diaconal Ministers

- a. Function – Education, Service and Pastoral Care
- a. Education (730)
  - i. Three year program of preparation leading to testamur of the United Church; or
  - ii. A five-year non-residential program of preparation for ministry leading to testamur of the United Church.
- b. Requirements – active member of UCC for at least 24 months, current close association with UCC Congregation willing to meet with Discernment Committee to have call tested, be recognized by local church and Presbytery as Inquirer. (022(b))
- c. Application – By person who believes they have a call to ministry. Approach Clerk of Session or Secretary of Board of Congregation asking to be recognized as Inquirer. (022(a))
- d. Process
  - i. Session decided re-request from individual to become Inquirer. (022(c))
  - ii. Discernment Committee established with Congregation and Presbytery members to meet with Inquirer over 12 months to determine suitability for ministry, with Presbytery oversight of process. (022(d)(e)(f)(g))
  - iii. Presbytery reports to Conference all Inquirers under its care (022(h))
  - iv. Discernment Committee recommends to Session or Church Board about Inquirer’s suitability for Candidacy for ministry, and report to Presbytery (022(i))

- v. Presbytery Education and Students Committee arranges interview with Conference Interview Board. (022(j)).
  - vi. Education and Students receives Interview Board report, Discernment Committee report, Session or Church Board report, and application and police check from Inquirer; interviews Inquirer and recommends to Presbytery whether Inquirer should become Candidate (022(k), 346)
  - vii. After informing Inquirer of requirements regarding pension fund and Transfer and Settlement, Presbytery decides whether or not to receive applicant as Candidate (022(l)(m)), communicates to Candidate, congregation, and General Council unit (022(m)) and if Inquirer made Candidate Covenanting Service and dissolution of Discernment Committee.
  - viii. Presbytery to supervise Candidacy including annual interview regarding call and fitness and certify to and receive report from theological school. (024) Integrated field work requirement (732). R eports annually to Conference. (024)(382(b)(c))
  - ix. Application for commissioning to Presbytery Education & Students. Interview. T heological School testamur. Conference Education & Students interview regarding readiness (462(a)ii,iii,iv). C ommissioning can take place if criteria met and settlement placement available. (027, 424(b))
  - e. Designation - Commissioning by Conference as Diaconal Minister (028, 424(a)(c))
1. Lay Pastoral Ministers
- a. Function – pastoral ministry
  - b. Education
    - i. At least 3 years of educational supervision while under appointment as a Lay Pastoral Minister in Training, satisfactory completion of 3 residential training events held under direction of General Council unit, participation in Conference Orientation events while a L ay Pastoral Minister in Training. (733)
  - c. Requirements – active United Church member for five years, over 40 years of age, be an Inquirer with one year of discernment, support of local church, not to have been a candidate for ordination or commissioning in the past 12 months, police check.(343)
  - d. Application (not specifically described, see section 343 of the Manual)
  - e. Process - Church’s Support and Discernment (433, 153(b)vi)
    - i. Presbytery determines eligibility (343(a)(b))
    - ii. Interview with CIB and Presbytery E&S (343(c))

- iii. Appointment by Presbytery, with requirements (343(d)) and designation as Lay Pastoral Minister in Training for 3 years of program (3439(d), 733)
  - f. Designation – designation by Conference as Lay Pastoral Minister (343(f), 427(c), 462(a)v)
2. Staff Associates
- a. Function – education, service or pastoral care (345(a))
  - b. Education – “education, training or life experience appropriate to that particular ministry” (001)
  - c. Requirements – provide information regarding character, education, life experience, and general fitness for the particular ministry (345).
  - d. Application – for a particular position in the church.
  - e. Process - Church Support and Discernment –
    - i. Presbytery oversees the selection process for the position of Staff Associate (345(b))
    - ii. Request to Presbytery with information about position and person (345(c)), Conference Board Interview (for first appointment) (345(d), Presbytery Interview (345(e), Presbytery decision (345(g), 153(b)vi), Settlement Committee if appointment for more than one year (345(f).
  - f. Designation – designated by Presbytery as Staff Associate for duration of the appointment by Presbytery (345(h))
3. Ministers seeking Admission from other denominations
- a. Function – as per Ordained or Diaconal Ministers of UCC. These people are ordained or diaconal (or equivalent) of another denomination who have been approved by the General Council unit and who have been appointed to a Pastoral Charge, Mission or Outreach Ministry.
  - b. Education – 5 specified courses within 42 months, focusing on UCC understandings. (031(f))
  - c. Requirements - ordained or diaconal (or equivalent) of another denomination who have been approved by the General Council unit and who have been appointed to a Pastoral Charge, Mission or Outreach Ministry.
  - d. Application - Person gets information from General Council unit, applies to General Council unit which assesses eligibility (031(a)(b)(c)(d)(e). Applicant contacts Presbytery regarding appointment as Diaconal or Ordained Supply, providing approval from General Council and needed documentation.
  - e. Process (031, 342)
    - i. Presbytery Education & Students interviews. (031(g)(h)(l))
    - ii. Conference Interview Board interview. (031(i)(j)).

- iii. Appointment for 12 months (031(k)) with Appointment Advisory Committee (031(m))
  - iv. Presbytery Decision re-permission for applicant to seek admission to UCC (031(o))
  - v. Appointment for 18-42 months (031(p)) with Educational Supervisory Team (031(t), 360)
  - vi. Presbytery final interview (031(u), Recommendation to Conference Education & Students (031(v)), Circulation of names to all Presbyteries (031(w)), Interview by Conference E&S (031(x), 462(a)vi), Conference Decision (031(y), 424(b)), Report to General Council unit (031(z))
- f. Designation – Ordained or Diaconal Minister of UCC (424(d))
4. Re-Admissions
- a) Application to Presbytery who check with Conference and General Council, arrange CIB interview, do P resbytery interview, may arrange for supervised probationary appointment, recommend to Conference. Name circulated, Conference Decision, report to General Council. (032, 361)
  - b) General Council regulates the re-admission of persons to the Order of Ministry. (505(f))
5. Diaconal Ministers of UCC seeking ordination and Ordained Ministers of UCC seeking Commissioning (023) – Presbytery and General Council unit determine what needs to be done in preparation.
6. Lay Preachers (734, 735, 344)
- a. Function – leading worship on a regular or occasional basis in Pastoral Charges of the Presbytery without appointment.
  - b. Education – 2 Year program under direction of Presbytery.
  - c. Church’s Support and Discernment
  - d. Status – licensing by Presbytery.

***Other Matters***

1. Recruitment – We have not dealt with recruitment but believe it to be an important issue. At the moment most people come into ministry by their own sense of call or initiative rather than by the church recruiting them. Since one of the concerns we heard raised in our consultations was that some inappropriate candidates enter ministry, it seems important to us that the church take initiative in seeking candidates for ministry that it believes suited to ministry. We commend this to the attention of the Ministry Vocations Committee and Faith Formation and Education Unit.

### Appendix C: Oversight Functions within the Church

The Commission Report, *A Call to the Table*, has much to say to the whole church about the importance of oversight. While they are discussing problems specifically in relation to General Council Executive, they identify a problem that lives in almost every corner of church life. The Report suggests that the General Council Executive tends to fix, not develop. “As a church court that meets semi-annually, the Executive has a natural, inherent tendency to deal with matters that come before it as present problems to be solved by immediate Executive action. The Executive will consider an issue (perhaps for a day or two in sessional committee) and then take some action they hope will respond to the problem. The Executive, individually and collectively, has discharged its responsibility for that issue, and moves on. In most cases, and not surprisingly in terms of its size and make-up, the Executive as a whole does not carry its responsibility for issues between meetings.” (p. 74) The Commission determined that “The Executive must design and implement processes through which it can exercise its oversight and accountability responsibilities on a continuous and active basis.” (p. 75) It is easy for Presbyteries to follow these same patterns: fixing instead of developing, seeking immediate solutions to respond to problems and moving on, and not exercising oversight between meetings. We believe that this emphasis on oversight and accountability named by the Commission must spread through every church court.

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We believe that the United Church has not functioned in its episcopal roles as effectively as it might have in many cases in the last few years. Our understanding is that episcopal/oversight roles involve:

- a) Leadership – A Call to the Table suggests that “Strong leadership is vital to the health of the church. Leaders bear the burden of the well-being of the whole church. A leader discerns, anticipates, and articulates the vision, and helps others find their place within the common enterprise. A leader models behaviours and commitment, motivates, and challenges. A leader is courageous. A leader holds others accountable to the ethos and the standards of the community. Leaders preserve and promote the integrity of the institution.”(p. 11). Because the United Church is a conciliar church, this leadership is vested in Committees as well as in individuals. The courts of the church need to be attentive to how they bear these leadership roles as committees and councils.
- b) Relationship – Oversight works most effectively when the parties know each other, and when there is a sense of the supervising body supporting the whole and its parts. Regular communication and interaction seem essential.
- c) Responsibility – As the Church we are all members of the one body of Christ (Romans 12:4-8, I Corinthians 12:4-26). As people with varied gifts and who make up the whole, we have responsibility for each other part of the body. As well according to the polity of the United Church of Canada, each court of the church has responsibility for oversight of the well-being and religious life of other courts of the church.
- d) Accountability - The flip side of responsibility is accountability. Those who hold responsibility are asked to give an account of the completion of tasks entrusted to them, of their oversight of the religious life of others, and of their actions to demonstrate how they have sought the well-being of the church and met the policies and procedures of The United Church of Canada.
- e) Administration – Those with oversight also carry management, organizational development and nurture functions that foster the well-being of the whole.

General Oversight roles are carried out by the Board/Council, Presbytery or its Executive, Conference of its Executive, and General Council or its Executive. Specific oversight roles are given to Pastoral Oversight Committees of Presbyteries.

Oversight references:

- Session (5.10.1)
- Conference (7.6.2; 7.6.9; 329)
- General Council (421, 505(k))

(These do not fall in the mandate of this Task Group.)

Presbytery duties:

- It shall be the duty of the Presbytery to have the oversight of the Pastoral Charges within its bounds, to review their records, (Basis 6.4.1) to adopt measures for promoting the religious life of the Pastoral Charges within its bounds, (Basis 6.4.11) and to ensure that the Pastoral Charges comply with policies and polity of the United Church.

### ***Current Procedures for Oversight of Pastoral Relationships***

The duties of Pastoral Relations Committee includes oversight of the Pastoral Relationship as outlined in *The Manual* sections 350, 351, 352, 353, 354, 425, 355, 390, 468, 063, 356, 360, 361, 362, 364, 427, 365, 366, 318, 369, 244, 124, 125, 189, 211, 226, 128, 304, and 341. These duties continue to need to be covered and are appropriately covered by the Pastoral Relations Committee. **No changes are recommended to these duties.**

## Appendix D: Current Procedures for Appointments and Calls

### Summary of Current Processes

1. Appointments are normally made after a Joint Needs Assessment has been conducted. To conduct a Joint Needs Assessment, the following steps are needed by the Pastoral Charge in cooperation with Presbytery:
  - establish Joint Needs Assessment Committee (052(a) & (b) which
    - a. creates six profiles (community, ministry, resources, position, skills, and term) (052 (c)),
    - b. makes recommendations and circulates them (052 (d)(e)(f),
    - c. Reports to Official Board (052(g)).
  - The Official Board
    - a. makes a decision (053(a)),
    - b. notifies ministry personnel of the decision (053(b)),
    - c. Presents decision to Pastoral Charge meeting (053(c) plus 047, 048, 049).
  - The Pastoral Charge
    - a. makes a decision (053.1(a)),
    - b. notifies Presbytery Pastoral Relations Committee and ministry personnel in Charge,
    - c. Recommends action to Presbytery (053.1 (c)(d)(e)).
  - The following steps are needed by Presbytery:
    - a. have a Pastoral Relations Committee in place (389),
    - b. initiate Needs Assessment (050, 050.1, 051)
    - c. confirm that Pastoral Charge has completed process above (058(a),051.1),
    - d. make decisions regarding Official Board recommendations (058(b),
    - e. Appoint representatives to next step (058(c)(d)(e)(f)& 389(b)vi, vii, viii, ix, x).
2. If the decision is to declare a Vacancy, then a Joint Search Committee may be established (054).
  - Depending upon eligibility, it is possible to call or appoint:
    - i. Ordained Minister (055, 056),
    - ii. Diaconal minister (055, 056),
    - iii. Lay Pastoral Minister (343),
    - iv. Staff Associate (345),
    - v. Ordained Supply (031(k)(m)(q)(r), 342)),
    - vi. Diaconal Supply (031(k)(m)(q)(r), 342),
    - vii. Persons seeking re-admission to the Order of Ministry of the United Church (032(e)),
    - viii. Candidate Supply (024(e), 346),
    - ix. Student Supply, (See minutes of Meeting May 01)
    - x. United Supply (including retired supply who may be eligible for either call or appointment -- Eligibility for call (055) or appointment (054(d), 62, 047,048, 049, 034(a) 054(d), 062(a)), (See Minutes May 01)
    - xi. Lay Pastoral Minister in Training (343).
  - OR to apply for settlement (043, 057, 440-454, 712-713) or for an intern (466).
  - OR to request an Interim Minister (340) and establish an Interim Ministry Transition Committee (054.1, 465.1)

- If a call is to be issued, the Presbytery will
  - receive call forms (060(a)),
  - inform Pastoral Relations Committee who may recommend transmission to Settlement Committee (060(b)),
  - Send call forms to Settlement Committee and General Council. (060(c)),
  - Receive transfer if calling from another Conference. (451)
  - Prepare an Act of Covenant (061).
  - Settlement Committee has right for Decisions re- settlement including call (064(c)ii). Must act on recommendations from Presbyteries regarding calls (446) and may act if failure to call by June 30 end of Pastoral year (448). Must receive permission from Conference to settle if unit requesting larger Mission Support grant than previously (450)
  - Pastoral Charges receiving Mission Support grants can call, but Missions are served by Presbytery Appointments. (056)
  - Calls are without time limit.
- If an Appointment is to be made, the Presbytery will (389)
  - Presbytery Pastoral Relations oversees selection and appointment of Staff Associates (389(b)xiii), 345), has the authority to appoint Lay Pastoral Ministers-in-Training if applicant meets criteria and consultation happens with appropriate Conference staff person (343, 343(d)), recommends appointment of Lay Pastoral Ministers (343(g)), appoints an Ordained or Diaconal Supply (031(k)(m)(p)(q)(r), 342), appoints a person seeking re-admission to the United Church to a probationary, supervised ministry (032(e)) , appoints a Candidate Supply once report is received from Candidate's home Presbytery (024(e)), appoints United Supply (including retired supply), appoints Student Supply or Intern Supply. (041(b)). Pastoral Charges receiving Mission Support grants can call, but Missions are served by Presbytery Appointments. (056)
  - receive police check for individual (062(a)),
  - send forms to Settlement Committee and General Council (062(b)),
  - request change in Presbytery membership if the individual is from another Presbytery (062(c)),
  - Prepare an Act of Covenant (062(d)).
  - Appoint a Pastoral Charge Supervisor as required or appropriate (341, 389(b)xi)
  - Appointments are made for a specified period of time. If for longer than one Pastoral year needs to be consultation with Pastoral Charge and Conference Settlement Committee. Continuance dependant on favourable review. (389(b)v,x, 345(f))
  - Ecumenical and Shared Ministries appointments and Ethnic Ministries Appointments (342(n))
- If application is for Settlement,

- Candidates ordained or commissioned shall be subject to Transfer (029) and Settlement for their first placement to a full or part-time ministry (unless Diaconal with 5 or more years' experience ordained, or ordained with 5 or more years' experience commissioned) (443)
- Application is to be in writing (043)
- Conference is to be sure that every Pastoral Charge as far as possible has an effective Order of Ministry person and every effective Ordered Minister has a Pastoral Charge (064), hearing representations from directly concerned parties, and making decisions about placements. (064, 444-453)
- Report of Settlement Committee is given to Conference a report of all Ministry Personnel and their placements (426.1)
- If an intern is requested,
  - Application to Internship Committee (024(d), 466(b)iii)
  - Approval of site (466(b)iii)
  - Appointment by Conference Internship and Educational Supervision Committee of interns to sites approved by General Council unit. (466(b)iv)
- If an Interim Minister is to be appointed, the Presbytery will (340, 389(b)ix):
  - Work on goals, etc. with Pastoral Charge (389(b)vii)
  - Choose person eligible to be Interim Minister as per 465.1.
  - Receive police report
  - Arrange for interview between the individual and the Interim Ministry Transition Team. Make a Decision regarding the appointment.
  - Prepare an act of covenant.
  - Not allow Interim Minister to accept a call, appointment or settlement in that Pastoral Charge, Outreach Ministry or Mission immediately following the Interim period.
- The Presbytery will see that ministry positions are filled as far as possible (350).
- An Act of Covenant
  - At new relationship 352, 121.
  - In Pastoral Relationships where
    - Order of Ministry personnel settled or called (342(f))
    - Pastoral relationship established by appointment of Interim Minister (340(d), 389(b)ix), Ordained, Diaconal or United Supply (342(f), 389(b)x), Candidate (346(b), Lay Pastoral Minister or Lay Pastoral Minister in Training (343(h))
    - Or appointment at a Theological School or other teaching post in Church institution (352(a)), specialized ministry within the bounds of Presbytery (352 (b)), or Moderator, General Council staff, its units and Conference

- Executive secretaries (433, 524(k)), Inquirers (022(n), 382(b)v),  
Candidates for Ordered Ministry (346(b))
  - Pastoral Relationship is established for 6 months or longer. (062(d))
  - Warrant to Covenant – Service held only after Warrant to Covenant received (061(a)(b), 451, 712(a))
  - Services (061(b)(c))
- The Conference will: appoint a Settlement Committee (440-454), see that ministry positions are filled as far as possible in consultation with Ministry Personnel and Pastoral Charges(064, 425), and ensure that Pastoral Charge has paid pension assessments (444)
- 3. Congregations may appoint Congregational Accountable Ministers who are lay people working less than 14 hours per week in a congregation and are accountable to the Official Board. (001, 041.1) Lay Preachers (344) are licensed and under the direction of Presbytery. Lay Preachers are not in appointments to congregations.
- 4. No one can be appointed if on the Discontinued Service List (033, 368).
- 5. Multiple Staff settlements or appointments: Presbytery reviews job descriptions and remuneration. Pastoral Charge to do annual review of the conditions of work within the pastoral relationship(s). (124, 351)
- 6. Terms of call/appointment (vacation, housing, travel, study leave, salary, pension & group insurance, moving expenses, etc. (036, 030), 039, 362)
- 7. 315(a)(b) Outside UCC appointments (*consultation*) and Appointment of Non-UCC people (342(j)(n))
- 8. Licensing
  - Supply Appointments for sacraments and marriages (342(i))
  - Diaconal Ministers for sacraments and marriage (353, 427(b))
  - Lay Pastoral Minister for sacraments (343(j))

## **Appendix E: Current Procedures for Ending of Pastoral Relationships**

### ***Current Initiators and Processes:***

1. Request for change in Pastoral Relationship by Ministry Personnel: in writing to Secretary of Official Board and to Secretary of Presbytery at least 90 days following receipt or as approved (046). Request for Change of Pastoral Relationship may be in order to be available for call, settlement or appointment; be retained on roll, retire; resign from Order of Ministry. (046, 059(c)(d)(f)(g)(h))
2. Request for change in Pastoral Relationship by Pastoral Charge (046.1, 049, 059(c)(e)(f)(g)(h))
3. Request for change from Presbytery. (363(d)v) See also 045).
4. Presbytery Appointments are time specific. Pastoral Relationships may end by non-renewal of appointments.
5. Retirement (Ordained and Diaconal)
  - a. Attain 65 years or the following June 30. (365(b)) (Pension varies if at earlier age (365(d))
  - b. Postponing – determined by Presbytery and Conference in consultation with Pastoral Charge annually (365(c)).
  - c. Member requests Change in Pastoral Relationship, Applies to Presbytery who recommend to Conference who approve and forward to General Council Pension Department for compliance (Not in Manual)
6. Retirement (Lay Pastoral Ministers and Staff Associates)
  - a. Attain 65 years or the following June 30. (343(l))
  - b. Postponing – determined by Presbytery and Conference in consultation with Pastoral Charge annually (343(l)).
  - c. Member requests Change in Pastoral Relationship, Applies to Presbytery who recommend to Conference who approve and forward to General Council Pension Department for compliance.
  - d. Membership returns to a congregation at retirement. (Remit 5C)
7. Retired
  - a. Eligibility for call (055) or appointment (054(d), 62, 047,048, 049, 034(a) 054(d), 062(a)
  - b. Membership in Presbytery (310(a)iv, 316, 365(e)) and Conference (365(a)). Can be placed on roll of congregation (011(b))
  - c. Transfer of membership – Application to Presbytery who recommend to Conference who approve or recommend approval to General Council Transfer Committee (not in Manual)
8. Disability – Normally disability requires a leave rather than a change in Pastoral Relationship. If a person is on long term disability, then procedures in 037(i) may be

used to institute a change. Procedures need to be properly followed. Medical approval (via the insurance company) is normally required for this to occur.

9. Death (038, 356)

- a. When death of ministry personnel serving Pastoral Charge or on maternity or parental leave from that Pastoral Charge, Presbytery is notified of death (which ends Pastoral Relationship (038(f)) and names obligations.
- b. Financial provisions made as required for 6 months (038(a)(b)(d)) normally by Pastoral Charge or mission unit. Presbytery responsible to make sure obligations are met (including in appointments in Outreach or other ministries (038(c))
- c. Assistance can be sought by Presbytery in consultation with Conference staff person from appropriate General Council Unit (038(e))

10. Sexual Abuse - Disciplinary procedures

11. Discipline (for cause (045)) (Appeals 076) - to be dealt with by Discipline Task Group.

12. Criminal Charges (364) – Consultation among Presbytery, Pastoral Charge and Ministry Personnel, Conference staff, and General Council legal advisor, with Decision made by Presbytery about further Ministry functioning. Normally a hearing would be held before actual discontinuation of Pastoral Relationship although discontinuation of function as ministry personnel might be immediate or circumstances might warrant end of Pastoral Relationship.

13. Discontinued Service List

- a. Members of Order of Ministry may request their name be placed on Discontinued Service List (367(a), 427.1)
- b. Presbytery may place Order of Ministry Personnel on Discontinued Service List as per 314(d), 363(f)(g), 427.1 or as result of criminal offence (367(b)(e)(f), 427.1)
- c. Formal Hearing may recommend placement on Discontinued Service List (367(c)(d), 427.1)
- d. If on Discontinued Service List, no functioning as Ministry Personnel (367, 033, 075(k)v, 369, 427.1)

14. Discontinued Lay Appointment List

- a. If Presbytery terminates appointment of Lay Pastoral Minister, Lay Pastoral Minister in Training or Staff Associate as discipline, Presbytery makes Decision about whether to place name on Discontinued Lay Appointment List. (368, 363(f)(g), 369)

Presbytery roles:

1. Receive request for Change in Pastoral Relationship from Ministry Personnel or Pastoral Charge, consult, receive report of Presbytery Pastoral Relations Committee, decide re-dissolution of pastoral relationship and declaration of Vacancy, let Conference Settlement Committee and General Council unit know actions. (059, 357, 389(b)iv)

2. Retained on the Roll – those in active ministry (with call or appointment in a Pastoral Charge or special ministry, Ordered ministers who are General Council staff, chaplains, faculty at theological schools), retired members of Order of Ministry, those ministry personnel on Disability pensions from the United Church of Canada.

## **Appendix F: Resources Used for Task Group Work**

### ***Materials Consulted***

- *A Call to the Table*, The Commission Report, August 21, 2002.
- *A Choice for a Changing Church: The Report of the Working Group on the Changing Church to the 37<sup>th</sup> General Council*. Report to the 37<sup>th</sup> General Council, 2000.
- “Directory of Forms”, United Church of Canada Website, Faith Formation and Education Unit, 2001.
- *Ministry Together Report to the 37<sup>th</sup> General Council*. Report to the 37<sup>th</sup> General Council, 2000.
- *Pastoral Relations Handbook: Compilation of Resources for Joint Needs Assessment Committees and Joint Search Committees (2002 edition)*
- *Redesigning the Way We Work Together*, Report of the Directions Committee. November 2001.
- *Steps Toward Ministry*, Division of Ministry Personnel and Education, 2001.
- *Summary Report of the Evaluation of the Candidacy Process to the 36<sup>th</sup> General Council*. 1997.
- *The Manual 2001*. The United Church of Canada, 2001.
- *Unified Placement Report to the 37<sup>th</sup> General Council*, 2000

### ***Individuals and Groups Consulted***

Consultations included a questionnaire to Presbytery, Conference and General Council committees related to pastoral relations, oversight and education and students/ministry vocations. Telephone or in person consultations were held with 33 people or committees involved in this area of work. Draft documents were sent to various individuals and committees for response.

## **Appendix G: Task Group Members and Meetings**

### ***Committee Membership***

Ross Boden, Toronto Conference, Lay.  
Susan Butler-Jones, Saskatchewan Conference, Diaconal.  
Charlotte Caron, Saskatchewan Conference, Diaconal.  
Jesse Doyon, Francophone representative (to summer 2002)  
Denis Fortin, Francophone representative (from fall 2002)  
John Oh, Ethnic Ministries representative.  
Pegi Ridout, Hamilton Conference, Ordained.  
Pat Ritchie, Newfoundland and Labrador Conference, Ordained (from fall 2001)  
Stewart Russel, Maritime Conference, Ordained.  
Janet Sigurdson, All Native Circle Conference representative.  
Linda Thompson, Toronto Conference, Lay (to fall 2001)

### ***Staff***

Varying configurations of  
Mary Purdon  
Virginia Coleman  
Carol Gierak

### ***Meetings***

Six face-to-face meetings were held: May 11-13, 2001, September 21-22, 2001, January 25-26, 2002, April 14-16, 2002, October 18-21, 2002, and January 23-26, 2003. As well two conference calls have been held and one is anticipated in June 2003 to plan our presentation for the General Council meeting.