



CANADIAN CONSEIL
UNITARIAN UNITARIEN
COUNCIL DU CANADA

LAY CHAPLAINCY PROGRAM MANUAL

(2020)

Revised February 2020

The manual will be updated as needed. For the most current version please refer to the CUC website
<https://cuc.ca/>

CUC Lay Chaplaincy Program Manual

INTRODUCTION

The lay chaplaincy program is an essential ministry of the Canadian Unitarian Council and of its congregations. It gives congregations the opportunity to train their members to become religious officiants at rites of passages (child dedication and naming ceremonies, weddings, memorials, etc.). The lay chaplains can then provide these services to members of the larger community (and in the case of congregations without ministers, also to the congregation's members and friends). This outreach program is an important tool for putting the following CUC principles into action:

- Recognizing the inherent worth and dignity of every person, supporting clients' rights to rites of passage that are meaningful to them and their beliefs whether they are part of a religious community or not;
- Justice, equity, and compassion in human relations;
- Acceptance of one another and encouragement to spiritual growth in our congregations (for clients and lay chaplains);
- A free and responsible search for truth and meaning, reflected in our lay chaplains' work with clients to create rituals of meaning and purpose.

This program is also part of how we live out our CUC vision and aspirations:

As Canadian Unitarian Universalists, we envision a world in which our interdependence calls us to love and justice.

We aspire to be:

Deeply Connected: We strive to foster healthy relationships amongst and within UU communities, with the broader world and with all life.

Radically Inclusive: We strive to create hospitable, diverse, multi-generational communities.

Actively Engaged: We strive to work joyfully for a just and compassionate society, experimenting with new forms of community.

Theologically Alive: We seek to be ever-evolving in our understanding, open to new knowledge.

Spiritually Grounded: We seek transformation through personal spiritual experiences and shared ritual.

Revised 2010 by Joy Silver, Margaret Kohr and Douglas Hill.

Revised 2019 by Shoshanna Green, Rev. Meg Roberts and Ann Steadman.

The manual is available on the Canadian Unitarian Council's website, in the Resources for Congregations section.

PURPOSE OF THE MANUAL

The purpose of this manual is to provide an easily accessible and consolidated collection of the current policies and practices of the lay chaplaincy program. We hope it will serve as a useful reference for Congregational Lay Chaplaincy Committees (CLCCs), applicants for lay chaplaincy positions, and other interested members and friends of congregations.

The policies and procedures outlined in this manual meet the guidelines of the Canadian Unitarian Council, which are available on the CUC website (<https://cuc.ca/>) under Congregations and Leaders.

MISSION STATEMENT OF THE LAY CHAPLAINCY PROGRAM

The Canadian Unitarian Council's lay chaplaincy program helps clients and families obtain meaningful rites of passage, at places chosen by them, by:

1. recognizing their beliefs and wishes; and
2. being sensitive to the needs of others who attend the ceremony, and;
3. embodying Unitarian and Unitarian Universalist values that call for respect and acceptance of those who follow different paths of faith.

Feedback Requested

This manual is intended to be a useful workbook. If you have comments or would like to suggest changes, corrections, or additions, please let the CUC's National Lay Chaplaincy Committee (National Committee) know, by emailing us at lcc@cuc.ca.

Abbreviations

Canadian Unitarian Council - CUC

CUC's National Lay Chaplaincy Committee - National Committee

Congregational Lay Chaplaincy Committee - CLC

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PART ONE - PURPOSES AND HISTORY

Purposes of the CUC Lay Chaplaincy Program

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

The program also serves the following secondary purposes:

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

History of the Program

The CUC first implemented a chaplaincy program in 1970 in response to a need for Unitarian Universalist (UU) rites of passage. At that time, the few Unitarian Universalist ministers in Canada had difficulty meeting the needs of their own congregations, much less those of lay-led fellowships in their regions, which often required significant travel time. The new lay chaplain program allowed congregations to appoint one of their members to officiate at rites of passage, and to recommend them to the CUC to be licensed to perform marriages. It provided a much-needed service to our congregations and communities. Most congregations were well served by their lay chaplains, who conducted about 1,000 rites of passage each year.

In 1998, after nearly thirty years, the CUC Board decided to review and evaluate the program, and appointed a task force to do so, ensuring that its members represented a variety of regions and of experiences with the program. The task force began its work in the fall of 1999 and published its report and recommendations in January 2001. At the CUC Annual Meeting that year in Montreal, delegates adopted a number of its recommendations. A few administrative changes have also been made since that time.

In 2018, the CUC's lay chaplaincy program incorporated the following elements:

- Officiants appointed through it are called "lay chaplains" in English and "célébrant(e)s" or "célébrant(e)s laïques" in French.
- The lay chaplain program is overseen by the CUC National Lay Chaplaincy Committee, (National Committee) which is responsible for (among other things):
 - approving or declining applications for lay chaplaincy
 - planning and administering training
 - advising Congregational Lay Chaplaincy Committees (CLCCs)
 - helping to resolve any concerns relating to a lay chaplain or to the program, and
 - planning for the program's future.

In all jurisdictions except Nova Scotia, Prince Edward Island, and Quebec, the CUC applies for a lay chaplain's license to perform marriages on behalf of the congregations, making the CUC

the legally responsible agent. In the three noted provinces, however, each congregation applies for its own lay chaplains' licenses.

For each fee-generating ceremony conducted by a lay chaplain, a fee is levied on the congregation by the CUC, and the funds collected are used to support lay chaplaincy training programs.

PART TWO - THE LAY CHAPLAIN

Purpose of the Position

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

Relationship to the Congregation

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

Lay chaplains are supervised by their Congregational Lay Chaplaincy Committee (CLCC), or the board of trustees. If no such committee exists, lay chaplains should consult with their minister(s) and other staff members, or their board of trustees, as appropriate to coordinate their activities.

Lay chaplains are expected to attend and participate in CLCC meetings and activities and to participate in regular evaluations by the committee or the board of trustees, ideally after their first year of service and every two years thereafter.

Lay chaplains are registered with provincial governments in order to become licensed wedding officiants. The CUC is responsible for registering lay chaplains in all provinces except Nova Scotia, Prince Edward Island, and Quebec, where congregations are directly responsible for their registration. CUC lay chaplains may only perform marriages under a licence applied for and granted under the ecclesiastical authority of the CUC or, in the provinces of Nova Scotia, Prince Edward Island, and Quebec, of their own Unitarian or Unitarian Universalist congregation. A CUC lay chaplain cannot perform marriages with a licence obtained in any other circumstances or from any other authority.

General Expectations

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

Lay chaplaincy is an important outreach program of the congregation, and the lay chaplains represent their congregation in the wider community. They are expected to perform rites of passage in a manner that celebrates and dignifies those special occasions in human life, adding

spiritual depth to the lives of individuals and communities. Lay chaplains are at all times expected to interact with the larger community in a professional manner, and to understand and be able to articulate and model Unitarian and Unitarian Universalist principles and practice.

Lay chaplains are those who have been:

- 1) **affirmed** by their congregation
- 2) vetted through and **approved** by the CUC's National Lay Chaplaincy Committee to ensure required documentation, qualifications and agreement with the program goals and restrictions as outlined in this manual
- 3) **appointed** by their congregation, and
- 4) **granted the appropriate provincial registration** either through the CUC or, in Nova Scotia, Prince Edward Island and Quebec, through their own Unitarian Universalist congregation.

Qualifications

Lay chaplains, and applicants for lay chaplaincy, must be

1. full voting members in good standing of their congregation
Note: Some congregations specify a length of time that a person must be a member before applying to become a lay chaplain.
2. actively involved in the life of their congregation
3. able to articulate why they want to become a lay chaplain
4. willing to adhere to the Code of Practice for lay chaplains (see below)
5. willing to adhere to the Conflict of Interest Guidelines (see below)
6. willing to adhere to the Counseling vs. Consulting Guidelines (see below)
7. willing to sign the congregation's standard contract
8. willing to conduct all standard rites of passage: weddings, memorial services, and funerals and child dedications
9. able to provide or arrange transportation to perform rites of passage
10. able to work flexible hours and respond quickly to requests
11. willing to renounce registration as a wedding officiant obtained through a religious body other than: 1) the CUC or, 2) in Nova Scotia, Prince Edward Island, and Quebec, their own Unitarian or Unitarian Universalist congregation.

Qualities

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

1. understand and be committed to the Principles of Unitarianism and Unitarian Universalism, and be able to articulate and model UU principles and practice
2. understand and be committed to the lay chaplaincy program

3. have the skills and ability to cope effectively and calmly in crisis situations
4. be able to communicate easily with people in a spirit of empathy, helpfulness and concern
5. be an effective and confident public speaker
6. be able to listen to and incorporate clients' needs and wishes for their rites of passage
7. conduct ceremonies with sensitivity to, and inclusion of, varied cultural, spiritual and religious traditions
8. present and conduct themselves in ways which favourably represent the congregation and the Unitarian Universalist faith
9. be able to meet with clients and conduct ceremonies with sensitivity to, and acceptance of, varied cultural, spiritual and religious traditions
10. be able to work both independently and as a team member with the minister, other individuals, and the congregation as a whole.

Responsibilities

In creating and officiating at services, lay chaplains are responsible for:

1. providing information on rites of passage in the Unitarian Universalist tradition
2. preparing the service in consultation with the clients
3. arranging for and conducting wedding rehearsals if clients want them
4. putting clients in contact with the lay chaplain's congregational musical director, accompanist, or other staff as appropriate
5. coordinating with and working with other vendors and service people, such as musicians, photographers, funeral directors, florists, etc., as necessary
6. ensuring, when services are held in their congregation's meeting space, that the space's integrity and security are maintained
7. ensuring that the legal requirements for performing, registering, and recording a marriage are met
8. maintaining a congregational record of services performed, fees earned and expenses incurred
9. providing data on clients and services as required by the congregation's Board of Trustees and treasurer, and the Congregational Lay Chaplaincy Committee.

Training Expectations

The CUC recommends that lay chaplain candidates be identified by their congregation a year before an anticipated replacement is required. Candidates can spend this year shadowing an experienced lay chaplain to learn the role and continue discerning whether they wish to pursue it. Whether or not this shadowing is feasible, candidates are expected to successfully complete an initial training approved by the CUC National Lay Chaplaincy Committee. This training is usually conducted by ministers and experienced lay chaplains.

In addition, lay chaplains are expected to attend regular enrichment training sessions, within reasonable limits of time and cost. Enrichment training is usually provided prior to each CUC national conference, at other regional events, and by congregations..

The greater the variety of training in which a lay chaplain participates, the better they are likely to perform in the role. Lay chaplains are therefore encouraged to take advantage of training and enrichment opportunities beyond those that may be offered by their own congregation and the CUC. For instance, funeral homes may offer instruction in conducting memorial services, and colleges and universities may offer relevant courses, such as on the meaning of ritual. Other responsibilities are described in Part Five—Operational Considerations.

Lay Chaplain Code of Practice

The Code of Practice was originally developed by the former Canadian UU Lay Chaplains' Association. It has been adopted with minor changes by the CUC National Lay Chaplaincy Committee.

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

The Code of Practice reads:

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

Self

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

Colleagues (Other Unitarian and Unitarian Universalist Officers)

1. I will do my best to support other officiants and to keep, for them, an open mind and heart.
2. I will respect confidentiality among officiants.
3. I will not speak disrespectfully or in derogation of any officiant.
4. When necessary, I will speak directly with another officiant in a responsible, temperate, and constructive way.

5. In congregations with ministers, I will respect the primacy of my minister's role in my congregation in providing rites of passage according to my congregation's policy.
6. I will support fair and equitable sharing of ceremony requests with other lay chaplains.
7. When co-officiating, I will work in cooperation and in accordance with clearly defined responsibilities.

Community

1. I will hold to a single standard of respect for all members of the church and the larger community.
2. I will respect the confidentiality of private communications.
3. I will respect the private and intimate boundaries of others' lives, and I will not trespass on those boundaries for my own advantage. My relationship with families requesting special services will remain professional.
4. I will avoid exploiting the needs of another person for my own purposes, e.g., by continuing a dependent relationship beyond a service.
5. I will treat the religious beliefs and cultural traditions of others with respect and sensitivity.
6. I will strive to live and to speak in a way that exemplifies the best of Unitarian and Unitarian Universalist values and traditions.

Lay Chaplain *Consulting* vs. *Counseling* Guidelines

Lay chaplains consult and provide information about rites of passage, but must be careful they do not provide advice or support that could be considered as counseling. Support, compassionate conversation, and encouragement are integral to consulting and are therefore acceptable within the context of ensuring that clients are informed participants in the creation of their ceremony. Lay chaplains must listen and explore to discern what their clients want, and meet their needs in a supportive and encouraging way.

Talking with clients who are grieving requires a balance between being supportive without providing counseling. Lay chaplains must be good listeners while ensuring that the conversation centres on preparing the service. Lay chaplaincy training addresses dealing with grief.

To help keep lay chaplains from moving into the realm of counseling, the CUC requires congregations to include in the lay chaplains' contracts a declaration that the lay chaplain will not engage in counseling that goes beyond consulting on rites of passage. In addition, training and mentoring must ensure that lay chaplains understand the distinctions between counseling and consulting.

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

If a lay chaplain believes that professional help may be needed, they should tell their clients that they cannot offer counseling in their lay chaplain role. The lay chaplain may confer with their minister (if the congregation has one), suggest that the clients speak to the minister, or suggest that they seek out a trained professional. A lay chaplain may keep a list of available community services, but must not refer clients to a specific provider. Doing so risks being held liable if the provider turns out to be inappropriate; moreover, it is not appropriate for a congregation to favour one provider over another.

If the lay chaplain suspects child abuse, this must be immediately communicated to the authorities in accordance with provincial law. If they suspect spousal abuse or elder abuse, they should immediately seek advice from a minister or a qualified professional, or immediately speak with the appropriate authorities.

Lay Chaplain Guidelines on Role Confusion and Conflicts of Interest

In order to maintain the integrity of the lay chaplaincy program, lay chaplains must avoid situations which could create a real or perceived conflict of interest or lead to confusion about the lay chaplain role. Responsibility lies with both the Congregational Lay Chaplaincy Committee (CLCC) and the lay chaplains themselves to make clear to the congregation and the larger public that the role of the lay chaplain is solely to provide rites of passage.

The following are major risks for role confusion or conflict of interest and must be avoided:

1. Using the role as a primary source of income for the lay chaplain or the congregation:
This could compromise the spirit and purposes of the lay chaplaincy program. It could lead to competition among lay chaplains in the congregation or in surrounding congregations, potentially creating dissension and discord. It could create pressure to resist fairly sharing ceremony requests among lay chaplains or to resist the addition of more lay chaplains in a congregation. Should the congregation come to depend on lay chaplaincy income, inappropriate pressure could be placed on lay chaplains.

Congregations and lay chaplains are encouraged to promote the lay chaplaincy program, as a service to the community and as an outreach tool.

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

Real or perceived competition between the services provided as a lay chaplain for the congregation and as or for another organization could pose an ethical and/or financial conflict. There is also the risk that members of the congregation or the larger community may confuse the two roles. CUC lay chaplains may only perform marriages under a licence applied for and granted under the ecclesiastical authority of the CUC or, in the provinces of Nova Scotia, Prince Edward Island, and Quebec, of their own Unitarian or Unitarian Universalist congregation. A lay chaplain cannot perform marriages with a licence obtained in any other circumstances or from any other authority.

3. Agreeing to requests not to identify oneself as a Unitarian or Unitarian Universalist lay chaplain:

Failure to identify oneself as a Unitarian or Unitarian Universalist contravenes some of the stated purposes of the lay chaplaincy program: to promote and showcase Unitarian and Unitarian Universalist values and to assist non-Unitarians to connect with Unitarian and Unitarian Universalist congregations. Failure to identify oneself as a lay chaplain invites role confusion, inappropriately allowing clients and others to believe that the lay chaplain is an ordained clergy person. Lay chaplains must always identify themselves as a Unitarian or Unitarian Universalist lay chaplain when acting on behalf of their congregations in that role.

4. Counseling clients while providing lay chaplaincy services:

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

5. Providing ministerial leadership in a congregation, especially when there is not a congregational minister:

This could lead to role confusion and false expectations, as the lay chaplain could be seen as a minister.

6. Providing a rite of passage for a member or, in some cases, for a nonmember who is active in a congregation that is served by a professional minister, unless requested to do so by the minister:

It is important for a congregation to develop a policy about who provides rites of passage in what circumstances. Recommendations are provided below in Part Three on policies regarding lay chaplains.

If a lay chaplain wishes to take on a lay leadership role, such as chairing a committee, leading worship services, or sitting on the board, the CLCC should consider whether the dual roles might create a conflict of interest or lead to role confusion. The CUC encourages congregations to build a broad base of leadership.

Employee or Self-Employed?

It is important for congregations and lay chaplains to know whether the Canada Revenue Agency will consider the lay chaplain to be self-employed (i.e., in a business relationship with the congregation) or an employee of the congregation. The CRA publication RC4110, “Employee or Self-Employed?,” can help determine this; it is available in English at <https://www.canada.ca/en/revenue-agency/services/forms-publications/publications/rc4110/employee-self-employed.html>, and in French, as “Employé ou travailleur indépendant?,” at <https://www.canada.ca/fr/agence-revenu/services/formulaires-publications/publications/rc4110/employe-travailleur-independant.html>.

PART THREE - PERSONNEL POLICIES REGARDING LAY CHAPLAINS

Congregational Policy on Rites of Passage

- The congregation may choose a variety of people to offer rites of passage. congregational ministers, community ministers, intern ministers, student ministers and lay chaplains can all be licensed to officiate. Providing high-quality rites of passage to the public and to those active in the congregation is the goal.
- As previously noted, the lay chaplaincy program was created to allow congregations that would otherwise be unable to do so to provide rites of passage for their own community and to the public. While many congregations now are served by professional ministers, the lay chaplains still fulfill an important outreach ministry by serving the public, as many ministers feel they have limited capacity to provide rites of passage for those beyond the congregation. There are occasions when a minister, because of their role in the community or their relationship with members of the public, may perform services for non-members. Some examples:
 - To build connections for the benefit of the congregation's ministry. Examples:
 - If it is a challenging situation (e.g., a memorial for a suicide/murder/infant death), the minister is usually better trained and more experienced in handling these situations.
 - If the minister wants to connect with an individual/family/group in the city, there is potential for furthering connections with the congregation (e.g., potentially future members or a group in the city to build bridges with).
 - If the person/family is high profile, it helps the congregation for the minister to be connected and have wider exposure to the larger community.
 - In the case of part-time ministers, interns and student ministers, rites of passage fees may provide needed income. Ministers are often not paid commensurate with the amount of education and training they have, so it is a good congregational practice to support ministers in their vocation. Also, student ministers and interns benefit from getting experience as part of their training process.
- In lay-led congregations, lay chaplains can provide rites of passages directly to those active in their congregations as well as to the public.
- When a minister is not able to perform a rite of passage for a member of the congregation, they can request a lay chaplain to officiate instead. Occasionally a minister may invite a lay chaplain to co-officiate at a rite of passage with them.
- It is common practice that ministers, because of their training, professional skills, expertise, and relationship with the congregation, lead rites of passage for members and

others active in the congregation. Congregations have entered a relationship with a minister so that they can help them, individually and collectively, in exploring theology and belief and support them pastorally. Performing rites of passage is an extension of this work.

Lay Chaplaincy and the Ministerial Search Process

During the search process for a new minister, a congregation should discuss with each ministerial applicant their interest in and preferences regarding who will offer rites of passage to members, others active in the congregation, and members of the public. If the applicant is not from Canada, they should be introduced to the principles, purposes, and practices of the congregational lay chaplaincy program (since the program is unique to Canada).

In the negotiation process with a ministerial candidate, an agreement about how rites of passage are handled should be included in the minister's letter of agreement or contract. It is good practice for the ministerial candidate to meet with the Congregational Lay Chaplaincy Committee (CLCC) and lay chaplains to discuss a policy around rites of passage so that there can be an understanding between them. If a rites of passage policy exists based on a past relationship with a former minister, that policy may need to be reviewed and revised based on the new letter of agreement or contract.

The goal is to have healthy, supportive working relationships between the minister, lay chaplains and the CLCC, as well as to support a healthy ministry within the congregation. A clear procedure for roles and responsibilities regarding conducting rites of passage is part of building healthy congregational relationships.

Recruitment and Affirmation of Lay Chaplains

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

Once a successful interview and reference checks of the applicant have been conducted by the CLCC, its chair will make a recommendation to the congregation's Board of Trustees to have them affirmed at the next suitable congregational meeting.

CUC Policies

CUC Approval and Congregational Appointment

Following a candidate's affirmation by congregational vote, the chair of the CLCC will then submit the [Lay Chaplain Endorsement Form by Congregations](#). The candidate will submit the [Lay Chaplain Application for New Lay Chaplains](#). (These forms are also available on the CUC website .) The National Committee will review these to ensure that the necessary information has been received and will notify the congregation when the candidate is approved. The

congregation can then proceed to appoint the new lay chaplain by signing a contract with them.

Registration with CUC and Provincial Government

Following approval of the candidate by the National Committee and their appointment by the congregation, the chair of the CLCC advises the CUC office of the appointment by emailing lcc@cuc.ca, and forwards a copy of the signed contract. The CUC is responsible for applying for the registration of lay chaplains as licensed marriage officiants in all provinces except Nova Scotia, Prince Edward Island and Quebec, where the congregations are directly responsible for registration with the provincial licensing body.

See Appendix A, Lay Chaplain Application Process.

See Appendix B, Lay Chaplain Resources.

Request for Additional Lay Chaplains

Each congregation has an automatic allocation for two lay chaplains. Where a congregation feels it needs lay chaplains in addition to those already approved by the CUC, it should submit a letter of request to the CUC National Committee (lcc@cuc.ca). The letter should address the following areas as appropriate. These will be considered by the National Committee before it approves any extra lay chaplains for a congregation on the basis of:

- Community connections – e.g., language or cultural issues that the current lay chaplains cannot address, requests for more rites of passage than they can perform, etc.
- Changes in congregational circumstances —e.g., a minister has arrived or left, the congregation has grown, etc.
- Limitations on current lay chaplains —e.g., health issues, mobility issues, temporary leave needed, too large an area for them to serve.

Term of Appointment

Lay chaplains are appointed for six-year terms. After their appointment, lay chaplains must be re-affirmed annually by a congregational vote. The six-year term starts when they are licensed to perform marriages.

Benefits of limited terms of appointment

1. Allowing the role to be distributed among members of a congregation, thus providing an opportunity for a number of individuals to both serve the congregation and experience personal growth.
2. Preventing the lay chaplaincy position from becoming a primary income source for an individual.
3. Discouraging the perception that the lay chaplaincy designation belongs to an individual and that the appointment is permanent. This is consistent with other lay roles in our congregations in which individuals know they are expected to grow with the position and move on to other challenges within our faith community.

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

Extension of Six-Year Term

It is assumed that after the six-year term the current lay chaplain is retired from this role. It is, however, recognized that: 1) smaller congregations (those with fewer than 100 active members) have a limited number of persons to draw upon; and, 2) only certain individuals have the time, motivation and skill set to fulfill the role of lay chaplain. If, at the end of a lay chaplain's six-year term, and following a vigorous search, the CLCC is unable to find a suitable replacement, the congregation may apply to the National Committee for approval to extend the term. A letter of request, explaining the rationale, should be submitted via email to lcc@cuc.ca. The term may be extended annually for an additional term of one year, up to a maximum of three years, with the approval of the National Committee.

Retiring Lay Chaplains

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

When a lay chaplain retires, the CLCC needs to inform the National Committee so that records may be updated and the license cancelled with the appropriate provincial authority.

Role of the Retired Lay Chaplains

Once retired, lay chaplains are encouraged to support incoming lay chaplains and mentor them as appropriate. They may also provide valuable insight and guidance as members of the CLCC. Retired lay chaplains may be invited to join the National Committee and/ or to apply to become a national trainer.

From time to time, a family may specify that it wants a particular former lay chaplain to perform a ceremony. A retired lay chaplain is encouraged to consider the following possible responses to such requests, depending upon the specific situation:

- They may decline to do the service, and provide the family with contact information for the current lay chaplains.
- Once the current lay chaplain has met with the family, if the family would still like the retired lay chaplain to be involved in some secondary way, the current lay chaplain could arrange with the family an appropriate way for the retired lay chaplain to participate in the ceremony (e.g., do a reading, light the chalice, etc.)
- With the permission of the current lay chaplains and the CLCC, they may agree to do the service. In this circumstance, they must make clear to their clients that they are no longer a lay chaplain and are serving by special permission. A retired lay chaplain will no longer have a valid license, so if the requested ceremony is a wedding, either the current lay chaplain has to perform the legal parts of the ceremony and sign the license, or the retired lay chaplain needs to apply for a temporary license.

CLCCs are encouraged to create a policy regarding the role of a retired lay chaplain.

Reappointment

When a lay chaplain has completed the initial six-year term, or resigns the lay chaplaincy position before the initial six-year term is completed, they are permitted to reapply after a period of time. The time off before reapplying is usually one year off for each year served. In smaller congregations (those with fewer than 100 active members), only one year off is required before a re-application by a former lay chaplain will be considered by the National Committee.

PART FOUR - ROLE OF THE CONGREGATIONAL LAY CHAPLAINCY COMMITTEE (CLCC); THE MINISTER; THE CUC NATIONAL LAY CHAPLAINCY COMMITTEE (NATIONAL COMMITTEE)

Congregational Polity

Each Unitarian or Unitarian Universalist congregation in Canada is an independent congregation and is first and foremost responsible for managing its own affairs. This is referred to as congregational polity, the way we govern ourselves.

Another aspect of our polity is that we choose to associate to support and strengthen each other, as well as be accountable to one another, within our Unitarian Universalist movement in Canada. The CUC is that association of independent congregations. Its purpose is to support those congregations.

The lay chaplaincy program is a program of the CUC, and it bears ultimate responsibility for the conduct of lay chaplains. While the CUC does not have exclusive authority in matters pertaining to lay chaplains (the congregation chooses the lay chaplains and monitors their work), it has a responsibility to ensure that all member congregations are acting consistently within their obligations, legal and otherwise. The CUC has an important legal and moral responsibility as the national religious body responsible to most provincial authorities for lay chaplains being legally recognized as religious officiants for weddings. It therefore has a responsibility to ensure that congregations are responsibly working with provincial and federal authorities.

Congregational Lay Chaplaincy Committee (CLCC)

Each individual congregation that has (or wishes to have) one or more lay chaplains must have a CLCC or designated members of the Board to oversee the work of their lay chaplains and ensure that CUC policies are followed and guidelines are respected.

The CLCC plays an important role in creating a healthy and supportive lay chaplaincy program. The program is an important outreach for a congregation, putting our principles into action by providing rites of passage to both those active in our congregations and those in the larger community.

The congregational committee's role includes:

- supporting outreach for the congregation by helping to develop a publicity plan for lay chaplaincy,
- supporting lay chaplains, by assisting in the creation of a development plan,
- maintaining familiarity with lay chaplaincy program policies,
- maintaining an interest in and knowledge of rites of passage, ritual, multifaith work and the ways this work supports spiritual growth for lay chaplains.

Members of a CLCC should include people who have some knowledge of the program, or who offer leadership to the congregation (such as retired lay chaplains, board members, retired ministers, and others who have provided leadership to the congregation). The minister, if there is one, should also be on this committee, as they are a trained religious officiant and understand

the Unitarian and Unitarian Universalist grounding in ritual and rites of passage. In small congregations, the CLCC might be the congregation's Board with an individual identified as responsible for overseeing the program.

The CLCC (or Board) should:

- a) decide whether the lay chaplains have CLCC voting privileges; if so, they must abstain from voting on remuneration or contractual decisions.
- b) know the role of the minister on the CLCC in accordance with the minister's letter of agreement or contract with the congregation.

Lay Chaplaincy Committees in Emerging Groups

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

Interim Guidelines on Appointing Lay Chaplains for Emerging Groups The appointment of a lay chaplain from an emerging group can happen through a connection with a 'mentoring congregation'. The lay chaplain would then be accountable to the CLCC of the mentoring congregation. The emergent group's responsibility would include sending the training levy for each fee-generating rite of passage to the CUC annually. The duties of the mentoring congregation cease when the emergent group achieves full congregational status in the CUC. The National Committee can assist and monitor this process.

Roles and Responsibilities of the Congregational Lay Chaplaincy Committee (CLCC)

The CLCC Committee is responsible for overseeing the lay chaplaincy program by following the CUC guidelines, policies and mandates found in this manual.

See Appendix B for resources available on the CUC website:

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

Lay Chaplaincy Contract

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

Meetings

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

Main Responsibilities

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

Create

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

- fee for service structure
- method for collection and distribution of fees for service (including fees for the lay chaplain, the congregation [if there is a fee for administration], and the CUC training levy)
- contract language based on the model lay chaplaincy contract
- policy for equitably sharing requests for rites of passage where there is more than one lay chaplain in a congregation
- policy for who is responsible for officiating at rites of passage for those active in the congregation and for members of the larger community. The policy will include minister(s), lay chaplains, and any other officiants and be in accordance with the minister's letter of agreement or contract with the congregation. The policy will also include arranging for emergency coverage (e.g., when the minister or lay chaplain is unable to do a service) and the role, if any, of a retired lay chaplain in rites of passage.
- policy regarding right relations among lay chaplains and between lay chaplains and ministers
- back-up procedure for unanticipated situations
- appropriate exiting and recognition strategies for retiring lay chaplains
- complaint procedure consistent with those adopted by the CUC (see Part 5)
- policy for evaluating and reviewing lay chaplain performance and progress

Monitor

- the record-keeping of services performed
- that the training levy for services performed is submitted to the CUC

- the number of services per lay chaplain to determine the optimal number of lay chaplains needed by the congregation

Conduct

- evaluations and annual congregational reappointments
- a search for other members who might consider applying for the role of lay chaplain; doing this at least a year before a lay chaplain's position becomes open is recommended
- training sessions as requested by the CUC National Lay Chaplaincy Committee (National Committee)
- an interview with lay chaplain candidates in order to ensure that the candidate meets the qualification criteria according to CUC Lay Chaplaincy Guidelines and the congregation's bylaws and policies
- induction and retirement ceremonies for new and retiring lay chaplains, together with the Board and the Worship Committee

Review

- potential conflict of interest situations
- the fee structure for rites of passage, compared to fees of other Unitarian and non-Unitarian officiants in the area; doing this every few years is recommended

Maintain

- a list of lay chaplains from neighbouring congregations to call upon in case of the unavailability of the congregation's own lay chaplains (is recommended)
- a list of scheduled rites of passages, with date and contact information, so someone can fill in for the scheduled lay chaplain in the event of an emergency where the scheduled lay chaplain cannot attend. (For suggestions on this emergency backup list, see Part Five.)
- current website information with the congregational webmaster
- communication with the congregation's liaison on the National Committee

Recommend

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

Prepare

- submissions to the lay chaplaincy column in the congregation's newsletter
- an annual report to the congregational AGM

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

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

Role of the Minister

In those congregations where there is a minister, they are the professional person best equipped to evaluate the quality of rites of passage. They have a particular responsibility in ensuring the highest quality of rites of passage performed. The minister is frequently the primary resource and consultant to the lay chaplains. They can help provide assistance in training, support, and mentorship. It is recommended that the minister be a member of the CCLC and be consulted at the time of interviewing and of evaluation.

It is especially important that the minister be available to answer questions and consult with lay chaplains concerning difficult situations. The lay chaplains' role may, in part, be to assist the minister by performing rites as requested by the minister when the minister is unable to do them.

Where there is no minister in the congregation, there may be a need for an outside minister and/or competent mentor to assist in training and ongoing supervision. Administrative and financial arrangements would need to be worked out between the congregations involved. (Also see PART THREE - Policy on Rites of Passage.)

Evaluation of Lay Chaplains

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

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

An evaluation of a lay chaplain's performance should take into account:

1. demonstrated commitment to personal spiritual growth
2. attendance at and contribution to initial and ongoing training opportunities
3. evidence of respectful consideration of those persons with whom they interact

4. the quality of the preparation and presentation of rite of passage ceremonies
5. the maintenance and prompt submission of required activity and financial records

Attention should be given to behaviour such as:

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

Dealing with Complaints

It is recommended that congregations develop complaint and dispute resolution procedures. Please see Part Six for more information.

Termination

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

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

1. Consult with others to ensure objectivity,
2. Corroborate and organize the facts.
3. Conduct an ongoing evaluation procedure in order that the information does not come as a surprise to the individual.
4. Obtain your board's approval for the decision to terminate.
5. Expedite the decision. Choose an appropriate time to meet with the individual when privacy can be assured. Point out the positive contribution the lay chaplain has made before explaining why the individual's performance is unacceptable.

6. Have all the facts on hand at the meeting. Give the individual time to respond but be firm and clear in a respectful manner. It is important that the individual understand why they are being removed as a lay chaplain and when the termination is in effect.
7. The spokesperson(s) needs to avoid emotional statements or anger. It is important to be explicit, objective and to the point.
8. When appropriate, it may be suggested that the individual might perform satisfactorily in another role within the congregation better suited to their temperament and/or capabilities.
9. With the board and CLCC, agree on the information that will be shared with the congregation, and what will and will not be made public.

A lay chaplain who is being removed may have rites of passage scheduled. In this situation, the CLCC will have to consider:

- who will perform the scheduled rites?
- what will be conveyed to the clients about why the former lay chaplain is not available?
- does it make a difference what kind of service it is or when it is scheduled?

Role and Responsibilities of the CUC National Lay Chaplaincy Committee (National Committee)

The congregational lay chaplaincy program is supported through the National Committee. Its work is to help member congregations use their lay chaplaincy programs well. Members of the National Committee act as liaisons to congregations in their particular region of Canada and are available to respond to questions and offer support when required.

The National Committee reports to the CUC staff person responsible for the program. On recommendation of the National Committee, the responsible CUC staff person may make policy recommendations to the Executive Director. On occasion, the Executive Director may set up a task force to assist the National Committee in evaluation or policy development.

Representation

- The National Committee members include at least one minister, one lay chaplain (active or retired), one Congregational Lay Chaplaincy Committee (CLCC) member (active or retired), and one assigned CUC staff person.
- The National Committee will strive to be representative of the various regions across Canada by including up to four Congregational Liaison persons from the two Western regions (BC and Western) and up to five Congregational Liaison persons from Eastern regions (Central and Eastern).
- It is expected that Congregational Liaisons serve for a minimum of a two-year term, which can be renewed by the National Committee.
- Neither the ministerial nor CUC staff members have Congregational Liaison responsibilities.

To find out who your congregation's liaison is, or to contact the National Committee for any other reason, email lcc@cuc.ca.

Committee responsibilities include:

1. ensuring the timely processing of applications
2. approving or declining applications for new lay chaplains and requests for term extensions
3. planning and administering lay chaplaincy training
4. providing support to CLCCs by answering questions, proactively making contact with congregations, and providing updates and news
5. monitoring the collection of CUC training fund fees from congregations
6. participating in strategic planning for the program
7. participating in the resolution of identified concerns or complaints
8. ensuring that there is an identified liaison for each congregation.

Congregations and CLCCs are welcome to ask for help or advice from the National Committee.

Minutes of the National Committee meetings are available upon request to all members and congregations.

The National Committee members meet regularly by online conference. Matters may also be discussed on other platforms, such as email, telephone and others, especially when an item of business is urgent.

Each member of the National Committee is responsible for liaising with a defined group of congregations. The name of the congregation's Lay Chaplaincy Committee liaison can be obtained from the CUC. National Committee members do not liaise with their own home congregation.

Role of the Minister on the CUC National Lay Chaplaincy Committee (National Committee)

It is the intention that at least one minister serve on the National Committee, with their unique gifts and training. One will be the Unitarian Universalist Ministers of Canada representative; there may be other ministers serving on the committee.

Recognizing that lay chaplaincy is an essential ministry of the CUC and each of its congregations, it is acknowledged that ongoing communication, collaboration and mutual support between lay chaplains and professional ministry is of great benefit.

There are several areas where a minister can be of particular service to this committee. The minister can::

1. maintain a focus on the spiritual development of lay chaplains. This can be done through trainings, through celebrations with the lay chaplains' congregations, and as part of the regular business of the National Committee. A minister may pay particular attention to, and hold up for others, those moments and events in which a lay chaplain gains spiritual growth or awakening in the process of their duties as a lay chaplain.

2. foster right relations within the National Committee, between the committee members and their assigned congregations, and between lay chaplains and their congregations. A minister may provide mentoring and counseling in these relationships by being available and listening to the needs of lay chaplains. This is of particular import for those lay chaplains who serve congregations without professional ministry.
3. support the National Committee members. The members of this committee have taken on a responsibility that may at times be stressful and demanding, and at other times fulfilling and rewarding. The minister may aid the committee members in both celebrating and making meaning of their service to the CUC.
4. liaise with other professional ministers. As representative of the Unitarian Universalist Ministers of Canada, the minister may provide a helpful link between ministers serving in Canada and the lay chaplaincy program. This could be of great benefit to ministers who are new to Canada and are unfamiliar with the program.
5. uphold a vision of lay chaplaincy within the context of our shared principles.

CUC Lay Chaplaincy Training Programs

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

Designing and Leading Rites of Passage

The CUC has delegated to its National Committee the task of overseeing and implementing the lay chaplaincy program, and it is this committee which is responsible for providing training opportunities. The CUC believes that, to be adequately trained for the role, each lay chaplain needs to attend the basics training program *Designing and Leading Rites of Passage*. When possible, this training shall take place at alternating locations in the east and west of Canada to maximize accessibility. The National Committee is currently considering how to make training more accessible through on-line delivery methods.

The training can also be useful to those exploring whether they want to become a lay chaplain at some point in the future. Congregational Lay Chaplaincy Committee (CLCC) members can also benefit from attending this basics training program to learn more about what it means to be a lay chaplain as well as what is involved in offering rites of passage. It can provide useful information when selecting new lay chaplains as well as evaluating existing lay chaplains..

There are also opportunities for enrichment training throughout the year, including the day prior to the CUC National Conference in May (held biennially). The fee submitted by congregations

for each rite of passage performed by their lay chaplains covers a major part of the expenses involved in these programs.

Enrichment Courses offered by the CUC

An important part of a lay chaplain's growth is engaging in enrichment training. Enrichment courses that may be offered include Challenging Memorials; Speaking from the Heart; Queer Perspective; Communication, Outreach and Promotion; and Deepening, Maturing and Growing. Enrichment courses are open to those who are currently serving in the role of lay chaplain. As enrolment may be limited, lay chaplains, ministers and ministerial students will be accepted on a first-come/first-served basis from the date that their non-refundable registration fee is received.

Waiting Lists

There are, from time to time, waiting lists for training events. A process to add people as spots become available has been established.

International Guests at Lay Chaplaincy Training

Under some circumstances, ministers (lay or ordained), staff, students, and members of Unitarian Universalist congregations in the U.S. or other international Unitarian and Universalist groups may ask or be invited to attend a session. The CUC may request an increased fee to cover the real cost of the course rather than the subsidized cost. When an application is received, the trainers for that session, along with the CUC staff person assigned to the National Committee and the chair of the National Committee, will make a decision on it. Principles of accepting such guests will be that their attendance does not limit the attendance of those in the primary target audience (i.e., others should not be turned away for their sake) and that their attendance will enhance the educational experience of the lay chaplains attending. If accepted, such guests will be asked to learn about the CUC lay chaplaincy program in advance so they understand the context of the training.

PART FIVE - OPERATIONAL CONSIDERATIONS

Familiarity with Marriage Legislation

Lay chaplains and Congregational Lay Chaplaincy Committee (CLCC) members must be familiar with legal procedures and requirements for entering into and performing marriages (both in their province or territory and federally). Requirements relating to eligibility for marriage, qualifications of officiants, record keeping, and more may be changed without public notice; congregations and officiants should monitor these and, where possible, share news of changes with other congregations and colleagues in the same jurisdiction.

Officiating at Funerals, Memorial Services, and Child Dedications

It is not necessary to have a license to officiate at a funeral, memorial service or child dedication ceremony.

Congregational Administrative Support

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

Fees for Service

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

Fees Submitted to the CUC

The CUC levies a fee for each fee-generating rite of passage performed. These fees are maintained in the Lay Chaplain Training Fund to support training for lay chaplains. The National Committee recommends that each congregation have a process for tracking, collecting and sending these fees to the CUC annually. The current fee and the form for fee submission can be found at: <https://cuc.ca/congregations-leaders/lay-chaplaincy/resources-for-congregations/>.

Requests for Service

Each CCLC Committee should establish a policy that describes how requests for lay chaplaincy services are to be received, recorded and, as required, forwarded to the lay chaplain(s). The

information gathered might include how the caller learned about the program, information-only inquiries, and cancellations.

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

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

The lay chaplain can make a conscientious choice to not officiate at particular ceremonies (e.g., if a marriage is only for the purposes of immigration rather than an ongoing partnership); if what the clients want in the service goes against a lay chaplain's ethical beliefs, or if the location or type (underwater, skydiving etc.) of the ceremony is inaccessible for the lay chaplain. If one lay chaplain is uncomfortable with a proposed ceremony, they could ask the other lay chaplain(s) in the congregation to perform it. If none of the lay chaplains is willing or able to perform a ceremony, it can be tactfully refused or referred to a lay chaplain in another congregation where appropriate.

Reporting and Record Keeping

Every Canadian jurisdiction requires lay chaplains to maintain a record of all weddings performed.

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

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

Emergency Backup

Each congregation should establish a back-up assistance plan to address those unanticipated situations where, because of illness or extreme emergency, a lay chaplain is unable to officiate at a scheduled rite of passage. Such a plan is good practice and public relations and minimizes both corporate and individual liability.

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

This list could include:

1. type of ceremony
2. date

3. place and time of the ceremony
4. names, addresses and contact information of key persons involved, and the name, address, contact person, and contact information of the venue.

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

Requests for Weddings and Similar Ceremonies for Polyamorous Relationships

Unitarian lay chaplains and ministers have occasionally been asked to officiate at weddings and other commitment ceremonies for people in polyamorous relationships; groups of three or more, or in cases where one or both parties have already married. However, doing so presents legal risks to both the officiant and the clients.

This information is shared to make lay chaplains aware of the risks, and not to marginalize polyamorous relationships. The commitment of the Canadian Unitarian Council to affirm the worth and dignity of individuals and free and reasonable choices by people is further reinforced by our commitment to support radically inclusive communities.

The situation of polyamorous weddings and ceremonies of union is different from same-sex ceremonies. Before same-sex marriage was legalised in various provinces and finally nationwide by the Civil Marriage Act in 2005, there were no legal constraints on participating in or performing a celebration of same-sex union; doing so was not *illegal* even in jurisdictions where it was *non-legal*. Although the union was not recognised legally, the ceremony was accepted as a personal declaration of love and commitment. Ministers and lay chaplains were free to perform such unions as a way to acknowledge our UU principle of the inherent worth and dignity of all.

However, the situation for participating in or performing a multiple union or marriage is quite different. Currently, under the Criminal Code of Canada, it is a criminal offence to participate in or perform such a ceremony, even if the parties recognise that the ceremony is not legally binding. Although polyamorous relationships have been legally recognised in other contexts (e.g., family law) and it is not illegal to be in a polyamorous relationship, the law continues to criminalise officiating at or otherwise participating in a ceremony that purports to sanction (that is, to “approve” or “encourage” or “expressly permit”) a marriage-like union of more than two people.

The CUC is responsible for the lay chaplaincy program, and hence for the conduct of lay chaplains. Lay chaplains, in turn, are in covenantal relationships with their congregation and with the CUC. Although a lay chaplain may wish to support polyamorous partners by offering a rite of passage to celebrate their love, doing so could put the lay chaplain and their congregation at legal risk.

Any lay chaplain or minister wishing to perform a rite of union for polyamorous partners should discuss this with their congregation's board, and ensure that the board and everyone else concerned is aware of the provisions of the Canadian Criminal Code on this matter.

It is important to remember that a ceremony uniting two people is not illegal even if one or both of them are also in a relationship with someone else, so long as neither member of the couple being united is already in a legal marriage or civil union, or has gone through a nonlegal ceremony of union, with someone else, and so long as the ceremony does not purport to unite anyone but that couple.

The Criminal Code penalises only weddings and similar ceremonies of union. There is no reason for legal concern about performing or participating in other ceremonies: a child may be welcomed by more than two parents in a child dedication, a person who has died may be grieved by more than one partner in a funeral or memorial, a home that more than two people will live in together may be blessed, and so on.

The CUC formed a task force on polyamory in 2018. The report of this task force, issued in 2020, offers more information about polyamory in the Canadian Unitarian Universalist context, including the legal context, and how it intersects and aligns with our Principles and Aspirations. It also offers some guidance for officiants, congregational leaders, and Canadian UUs in general, and makes recommendations to the CUC. A wealth of useful information is also available from Unitarian Universalists for Polyamory Awareness (<http://www.uupa.org>), a related organization of the Unitarian Universalist Association in the United States, although in reading that material it is important to remember that ceremonies of union for more than two people are not illegal in the United States.

At the time of this manual's updating (January 2020), the relevant part of the federal Civil Marriage Act (2015, c. 29, s. 4) reads:

2 Marriage, for civil purposes, is the lawful union of two persons to the exclusion of all others.

2.1 Marriage requires the free and enlightened consent of two persons to be the spouse of each other.

The relevant part of the Canadian Criminal Code (s. 293) reads:

(1) Every person is guilty of an indictable offence and liable to imprisonment for a term of not more than five years or is guilty of an offence punishable on summary conviction who

(a) practises or enters into or in any manner agrees or consents to practise or enter into any form of polygamy or any kind of conjugal union with more than one person at the same time, whether or not it is by law recognized as a binding form of marriage; or

(b) celebrates, assists or is a party to a rite, ceremony, contract or consent that purports to sanction a relationship mentioned in paragraph (a).

If a lay chaplain or congregational committee (CLCC) have questions or need clarification on any matters related to polyamorous unions they are encouraged to contact lcc@cuc.ca. Material on other ceremonies that do not pose legal risks will be developed and will be available at cuc.ca.

PART SIX - COMPLAINT RESOLUTION

Section I - Role of the Congregational Lay Chaplaincy Committee (CLCC)

Congregations should develop their own complaint and dispute resolution procedures. The following procedures are those recommended for adoption:

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

Section II - Role of the CUC National Lay Chaplaincy Committee (National Committee)

1. When a complaint is referred to the National Committee by a congregation, the Committee may:
 - a) dismiss the complaint
 - b) refer the complaint to an investigatory sub-committee for further investigation and recommendation

- c) take such other action as the Committee determines is warranted in the circumstances of the case, inclusive of the suspension of a lay chaplain pending an investigation. Such power shall be exercised only in circumstances where the National Committee is satisfied that the continuation of the lay chaplain poses a threat to the public or would otherwise jeopardize the integrity of the lay chaplaincy program.
2. Where the National Committee determines that further investigation is required, they shall appoint an investigatory sub-committee. Where possible, at least one member of the sub-committee shall be a member of the National Committee and shall serve as Chair of the sub-committee.
 3. The terms of reference of the sub-committee shall be determined by the National Committee. The sub-committee may be asked to serve only a fact-finding role, or may be asked to recommend a complaint resolution. The sub-committee shall endeavour to meet within 20 days of appointment. The investigatory sub-committee shall determine its own procedures but shall give full opportunity to all parties involved to make submissions with respect to the complaint and shall endeavor to ensure that all are adequately heard.
 4. After completing its investigation and considering all relevant information, the investigatory sub-committee shall forward to the National Committee a report of its findings. Where the National Committee has requested recommendations, they shall be included in the report. The National Committee may refer the matter back to the sub-committee for further investigation or clarification.
 5. A copy of the sub-committee's final report shall be forwarded to the complainant, the respondent (lay chaplain), the chair of the CLCC or congregational Board which submitted the complaint for investigation, and the Executive Director of the Canadian Unitarian Council.

After considering the report of the sub-committee, the National Committee may take the following actions:

- a) dismiss the complaint
- b) issue a written caution or reprimand
- c) suspend the person from the role of lay chaplain
- d) revoke the person's status as a lay chaplain
- e) maintain the person in the role of lay chaplain, with certain conditions attached
- f) require the person to undergo further lay chaplaincy training
- g) any combination of the above
- h) any other action that the National Committee considers appropriate and necessary to respond to the complaint.

It is important that complaints be handled as swiftly as is reasonably possible. Any of the parties who are dissatisfied with the outcome of these procedures may appeal directly to the CUC Executive Director for further review. All parties are encouraged to consult with the appropriate CUC staff person, National Committee member and congregational representatives at all stages of the complaint resolution.

APPENDIX A Lay Chaplain Application Process

The processes for application and appointment are being refined. The CUC website will have the most current information.

APPENDIX B Lay Chaplain Resources

The following can be found at: <https://cuc.ca/congregations-leaders/lay-chaplaincy/>:

1. Model Lay Chaplain Interview Form
2. Recruiting New Lay Chaplains and Lay Chaplain Committee Members
3. Lay Chaplain Application Responsibilities and Process
4. Assessment Form for Lay Chaplaincy Training Fund
5. Lay Chaplain Endorsement Form by Congregations
6. Application for New Lay Chaplains
7. Legal Requirements Regarding Marriage
8. Model Lay Chaplaincy Contract
9. Model Evaluation Process Kit for Large Congregations
10. Model Evaluation Form for Medium and Small Congregations
11. Guidelines for Wearing Stoles
12. Guidelines for Hosting and Facilitating Lay Chaplaincy Training Modules
13. Communication, Outreach and Promotion – How to Promote Your Lay Chaplaincy Services