

**Called
to Right
Relationship**

General Information



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To the Clergy and People of the Diocese of California —



Greetings in Christ. The Episcopal Church has been working with heart and mind for over twenty years to produce a coherent, fair, transparent, and usable set of policies that promote a healthy and safe environment for all in our Church. This is our commitment to God and to each other, and one significant manifestation of the Beloved Community.

**Letter
from
the
Bishop**

As Christians we strive, both individually and communally, to live the right relationship with God into which we are continually called. Through Holy Baptism we share a common life of faith, a life of service and servanthood, a life rooted in love and faithfulness. We promise at every baptism to strive for justice and peace among all people and to respect the dignity of every human being. As we celebrate the Holy Eucharist, we seek healing and wholeness for our broken world and for the brokenness in our communities and in ourselves.

Called to Right Relationship is a collection of the policies and procedures designed to support the people and congregations of the Diocese of California in this calling. These procedures have been developed in concert with policies adopted at the Episcopal Church-wide level, and at the same time build on the best practices of other dioceses while being adapted to our local context. I commend them to you as a living document to be read, marked and utilized in each congregation of the diocese.

Sincerely,

A handwritten signature in black ink that reads "Marc Handley Andrus". The signature is written in a cursive, flowing style.

Marc Handley Andrus

Preface

The *Called to Right Relationship* documents are a statement of professional expectations for clergy, and additionally for all people (including lay employees and volunteers), in their relationships with vulnerable people in church. Any discussion of ethics for the Church assumes the priestly vocation of the whole community, which in turn assumes the holiness of human relations and their place in holy creation. These guidelines are meant to encourage and inform all members of the diocese in their ministry-related activities involving the Episcopal Diocese of California and its congregations, whether parishes or missions. Please note, however, that the documents do not pretend to be a comprehensive statement of expectations for all relationships involving lay and ordained Episcopalians. Questions of civil, criminal, and employment offenses should be addressed with the relevant authorities first, and then as questions of ministry misconduct, when applicable.

The purposes of these policies is to foster the highest standards of ethical behavior in ministry settings, and the documents include resources for —

- Standards of professional conduct for clergy
- Procedures in the case of suspected violation;
- Protection of youth and children;
- Protection of elders and vulnerable adults; and
- Tools for documenting and assuring compliance.

Each congregation or institution is required to maintain a complete and current copy of this policy in a place accessible to all people. In addition, this policy may be found on the diocesan website.

Local entities may make additions in developing local policy so long as they do not conflict with the requirements of these policies. Any such additions must be submitted to the bishop's office in writing for the approval of the chancellor of the diocese. Nothing contained herein may be omitted from a local policy, although a local policy may place higher standards than those contained herein. Please consult with the chancellor of the diocese.

**About
These
Policies**

**Use of
These
Policies**

No policy can foresee every possible circumstance to which it may be applied. Local leadership must understand these policies thoroughly enough to make appropriate judgments about local circumstances. If this cannot be done, the local entity should contact the bishop's office for consultation.

Scope and Limitations of These Policies

This policy is intended solely for the internal use of the diocese in performing its functions as a religious body. It is not a contract, agreement, promise, or undertaking by the diocese to do or refrain from doing anything. It is not intended that the policy described in the statement be imposed as rigid law, binding the diocese or others; rather, the policy must be interpreted and applied compassionately in accordance with the theological and biblical principles of the Gospel. Any actions or decisions by the diocese in connection with the policy are to be undertaken at the diocese's sole discretion, in accordance with the theology and ecclesiology of the Episcopal Church, and in the exercise of the diocese's constitutional rights as a religious body. This document is not intended as a personnel policy or guide to employment decisions. A sample personnel policy can be found on the diocesan website at www.diocal.org/governance/finance-administration/general-finance-administration.

Theological and Ethical Foundations

To be human is to live with God and the whole of creation in the fullness of freedom, and the challenge of responsibility. When we misuse our freedom, we mar God's image in ourselves, rendering ourselves less than human. When we fail to live into the challenge of responsibility, we fall short of the fullness of life to which God continually calls us.

Creation

God expressed the fullness of humanity in Jesus of Nazareth, whom we worship as the Word made flesh. The pattern of Jesus' life, death, and resurrection resonates unreservedly with God's call to perfect freedom and responsibility.

Incarnation

"And the Word became flesh and lived among us, and we have seen his glory, the glory as of a father's only son, full of grace and truth." — John 1:14 (NRSV)

By freedom and loving responsibility Jesus shaped and nurtured a community in the pattern and power of life.

Community

In baptism God, speaking through the Church, claims us in Christ. We become in Christ the community of God's final purpose: justice and peace, love and plenty for the whole creation.

This new community lives in Eucharistic fellowship with God and Creation, as a sign and instrument of God's purpose in the world.

For this dignity and priestly calling the whole people of God are competent, accountable, and responsible and are called to be living reminders of this pattern of the human vocation.

The mission and ministry of the whole Church is to proclaim and anticipate the reign of God. The Church is called to minister in and to the world, and such ministry is the vocation of the whole community.

Authority

In baptism, laypersons, bishops, priests, and deacons share the ministry to "represent Christ and the Church." Since the ministry is Christ's, there are no fixed territories. However, Episcopal teaching understands the four orders to represent Christ

in different ways: lay persons in their daily life and work; bishops as apostles, chief priests, and pastors of dioceses; priests as pastors to the people; deacons as servants to those in need, bridging church and world.

Each order carries its own responsibilities. In particular, bishops, priests, and deacons are entrusted with and accept authority to speak and act on the Church's behalf in the name of God.

Christian ethics — the obligation to seek and serve Christ in all persons and to respect the dignity of every human being — remain binding for all the baptized. Through ordination, therefore, a covenantal relationship of trust is established between ordained persons and the Church as a whole, its communities, and its individual members.

Imbalance of Power

The authority with which the clergy are entrusted creates an inherent power imbalance in the pastoral relationship. This power imbalance derives from the leadership role and symbolic authority of any ordained person. It is intended to provide occasions for grace. However, its manipulation and abuse is always and unequivocally wrong.

Integrity and Intimacy

The pastoral relationship involves a necessary tension between a Gospel-based integrity and a Gospel-based intimacy as modeled by the life of Christ. A rigid adherence to a system of law leads to an unproductive legalism. On the other hand, without the framework of the law, the intimate relationships into which Christ calls us run the risk of losing integrity.

All the people of God are called to live and struggle in this pattern of tension. The ordained, by virtue of their special trust, are called into account to maintain the integrity of such relationships.

Violation and Justice

When a church leader violates the sacred trust and covenant of the community, it is the responsibility of the whole Church to provide support, advocacy, and protection for victims and potential victims; to investigate and adjudicate allegations fairly and thoroughly; and to demand redress, restitution, and amendment of life from offenders.

The Diocese of California is committed to justice.

Standards of Conduct for Clergy and Lay Leaders

The relationship of cleric and parishioner can be a powerful relationship in the lives of both, and can be integral to a parishioner's faith journey. A parishioner puts his or her trust in a cleric. In this relationship of trust, the cleric has a professional and moral responsibility to put the interest of the other person above his or her own needs. This relationship can become complex, and in some cases seriously impaired. It is the cleric's responsibility to maintain the integrity of this relationship.

Introduction

Lay ministers may be engaged in ministry by serving as elected parish leaders, by serving in leadership roles in worship (Eucharistic minister, lector, etc.) or by serving in other ministries offered through the Church. All lay ministers are expected to respect the dignity of others. Many of the guidelines offered below for ordained ministry apply to lay ministry as well. For example, lay ministers are expected to maintain appropriate confidentiality, boundaries, and self-care.

Lay leaders likewise have a responsibility to hold themselves to the highest standards of conduct when serving the people of God as leaders in congregations and in the diocese. As the Diocese of California becomes the Beloved Community, the living out of our baptismal promises and the sharing of episcopate, priesthood, and diaconate become sacramental signs of our call to right relationship with God and with one another.

The diocese offers the following standards of conduct to assist and support all members of the diocese in maintaining the integrity of relationships in which they offer ministry. It is expected that all ordained clergy and lay leaders in the diocese will be familiar with and will seek to follow these guidelines. These guidelines do not include all diocesan policies or contingencies. An attempt has been made to refer to additional diocesan policies where appropriate.

Standards

Clergy and lay leaders are welcome to contact the bishop and/or members of the bishop's staff as they seek to follow these guidelines, particularly if they are encountering struggles in so doing.

Clergy and lay leaders in the Diocese of California are expected to:

1. treat themselves with dignity and respect by taking good care of themselves;
2. comply with diocesan policies, including *Policy for the Protection of Children and Youth*.
3. comply with diocesan policies, including the *Policy for the Protection of Elders and Dependent Adults*.
4. avoid dual relationships and be aware of their consequences;
5. accept only token gifts from parishioners and others to whom you minister;
6. decline to accept loans of any kind from parishioners and others to whom you minister;
7. decline to agree to be named as a beneficiary or to act as an administrator or executor in a parishioner's will or that of anyone to whom you minister;
8. maintain confidentiality of information shared in the pastoral relationship;
9. comply with legally mandated reporting requirements regarding the suspected abuse and/or neglect of children and youth, the elderly, and vulnerable adults;
10. refer instances of mental health issues and substance abuse issues to licensed, insured and certified health care providers;
11. comply with the responsibilities of being an employer;
12. comply with financial practices as set forth by the Diocese of California and The Episcopal Church;
13. bring resolution to relationships with parishioners when ordained ministry at a parish ends; and
14. foster collegiality and accountability by participating in diocesan leadership opportunities and encourage the people to whom you minister to do likewise.

**Elaboration
of the
Standards
of Conduct
for Clergy
and Lay
Leaders**

An elaboration of each of these fourteen standards follows. If questions arise, clergy and lay leaders should contact the bishop or member of the bishop's staff for clarification and counsel.

1. Treat themselves with dignity and respect by taking good care of themselves.

This includes, but is not limited to, the following:

- a. **Self-care:** Regular and consistent incorporation of wellness and self-care practices in their life.
- b. **Accountability:** Clergy and lay leaders are strongly encouraged to have groups and individuals to whom they are accountable, with whom they confer as a

matter of ordinary course (e.g., colleague support groups, spiritual directors, psychotherapists, supervision). For new clergy and for clergy in transition to new calls, the diocese offers Fresh Start groups. Diocesan staff is available for consultation on how to form other cohorts.

- c. **Boundaries:** Setting appropriate limits with parishioners as to when they are available and boundaries in the relationship. If a parishioner violates boundaries by going beyond what is appropriate in the clergy–parishioner relationship (e.g., seeking to romanticize the relationship, demanding inordinate amounts of attention, seeking to meet with you alone, sending you too many and/or inappropriate email or text messages, or does anything that makes you feel uncomfortable or unsafe), firmly and clearly communicate what behavior is acceptable and what is not.

Some parishioners do not change their behavior in spite of a clergyperson’s efforts to explain why change is needed. In such cases, clergy are welcome to seek consultation by contacting the bishop or a member of the bishop’s staff.

- d. **Conflict-resolution:** Addressing conflicts that may arise between an ordained minister and a parishioner, or a group of parishioners, or lay leaders, in healthy ways.

Addressing conflicts includes seeking to maintain appropriate boundaries in relationships, communicating clearly and directly to those with whom you are in conflict, seeking nurture and support for yourself outside the congregation, and possibly seeking assistance from someone trained in conflict resolution. If you are struggling with conflict in your congregation or ministry, you may seek consultation by contacting the bishop or a member of the bishop’s staff.

2. Comply with diocesan policies and behavior standards regarding ministry with children and youth

In the state of California, clergy are mandated reporters for abuse of children and youth.

There is a comprehensive diocesan policy regarding ministry with children and youth (*Policy for the Protection of Children and Youth*). It sets forth behavioral standards for all adults engaged in ministry with children and youth throughout the diocese. This policy also sets standards for screening and selecting staff and volunteers who work with children and youth, monitoring programs for children and youth and responding to concerns. The policy also sets out in detail the behavioral standards for youth

and adults participating in diocesan sponsored youth events.

Ultimately, ordained leadership in each congregation is responsible for compliance with this policy within the congregation. This policy is available on the diocesan website at www.diocal.org/safechurch.

While behavior standards are outlined in the policy, the diocese cannot emphasize strongly enough that it requires its ordained and lay ministers to adhere to a high standard of conduct. The behavior standards applicable to all adults, ordained and lay, for ministry with children and youth are as follows:

Neither ordained nor lay ministers shall:

- a. provide children or youth with illegal drugs, pornography, or non-sacramental alcohol;
- b. consume non-sacramental alcohol or illegal drugs, or misuse legal drugs at any children's or youth event;
- c. be under the influence of alcohol, illegal drugs or misused legal drugs at any children's or youth event,
- d. engage in illegal behavior or permit other adults or children or youth to engage in illegal behavior,
- e. engage in any sexual, romantic, illicit or secretive relationships or conduct with any child or youth; or
- f. discuss their own sexual activities or fantasies with children or youth.

3. Comply with diocesan policies and behavior standards regarding ministry with elders and dependent adults

In the state of California, clergy are mandated reporters for abuse of elders and dependent adults.

There is a diocesan policy regarding ministry with elders and dependent adults (*Policy for the Protection of Elders and Dependent Adults*). It sets forth behavioral standards for all adults engaged in ministries with elders and dependent adults throughout the diocese. This policy also sets guidelines for responding to concerns.

The behavior standards applicable to all adults, ordained and lay, for ministry with elders and dependent adults are as follows:

- a. Focus on ministry that maximizes the vulnerable adult's independence and choice to the extent possible based on the adult's capacity.
- b. Use family and informal support systems first as long as this is in the best interest of the adult.
- c. Maintain clear and appropriate professional boundaries.
- d. Do no harm. Inadequate or inappropriate ministry may be worse than no ministry.

In our church communities, we encounter a wide range of elders and dependent adults who require an extra measure of attention from clergy and lay leaders. Broadly, elder abuse includes physical and emotional abuse, financial abuse, and abuse in long-term care facilities.

4. Avoid dual relationships and be aware of their consequences

Dual relationships in a church setting occur when clergy attempt to relate to a person on two levels at the same time. This can happen when clergy attempt to relate to an individual both personally and professionally (i.e., as cleric and parishioner, and at the same time in some other role such as supervisor and parish employee.) Dual relationships diminish the effectiveness of ministry.

To avoid dual relationships:

- a. Discourage hiring parishioners to serve in paid staff positions. If such an arrangement is unavoidable, the clerics and lay leaders should understand the risk to all relationships involved and take steps to mitigate the risk. The employment decision must be ratified by the vestry or bishop's committee, there must be clear guidelines for separation spelled out in the letter of agreement, and alternate arrangements must be made for pastoral support of the employee.
- b. Discourage clergy spouse, partner or family member to serve on parish staff as a lay employee, or as a parish officer or vestry member in the congregation where the related clergy person serves.
- c. Avoid intimate personal relationships with parishioners and others to whom you minister.
- d. Do not sexualize any relationship with parishioners or others to whom you minister.
- e. Develop personal relationships with people outside of the congregation to whom you do not offer ministry.

- f. Cultivate good habits of mind. It is necessary to cultivate certain habits of mind that help prevent the misuse or abuse of clerical privilege and authority. *These habits include the following practices.*
- i. Self-questioning: Am I conscious of my role as an ordained person in this situation?
 - ii. Recognizing danger signals:
 - a. rationalizations, such as finding excuses for pushing back the usual boundaries; this may be encapsulated in the rationalization: “People put this burden of perfection on me, but I’m only human;”
 - b. the need to be needed—getting a personal thrill from pastoral functions; or
 - c. failure to attend to any obsessive attachment to a pattern of fantasy (sexual, financial, self-aggrandizing, etc.).
 - iii. Cultivating the consciousness of possible problem situations in which your own history may make you particularly vulnerable.
 - iv. Cultivating a framework of containment: appropriate behavior, including physical, emotional, advisory: finding a stopping place.
 - v. Aiming for the perspective that while both cleric and the protected person are engaged in the “good work” of responsible Christian living, it is nevertheless the cleric’s role that puts the burden of responsibility on him or her — particularly with regard to maintaining boundaries.

5. Accept only token gifts from parishioners and others to whom you minister

6. Decline to accept loans of any kind from parishioners and others to whom you minister

7. Decline to agree to be named as a beneficiary or to act as an administrator or executor in a parishioner’s will or that of anyone to whom you minister

8. Maintain confidentiality of information shared in the pastoral relationship

In plain language, this means that clergy and lay leaders will not tell other people personal information a parishioner shares, unless that parishioner gives permission. Our goal is to uphold the principle of pastoral confidentiality, which exists to serve the process of healing and reconciliation, and, in the case of sacramental confession,

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of repentance and amendment of life.

At the same time, there may be occasions when the person providing pastoral care may properly exercise discretion in violating such confidentiality when there is grave danger of harm to the person being offered pastoral care, or to another person.

We wish to alert clergy in particular to the need to seek wise counsel to help them deal with the competing moral claims, the potential conflicts between ordination vows and the laws of the state, and possible legal ambiguities that arise when they become aware of the possibility of physical or sexual abuse of minors, or where there is grave danger of harm to the protected person or to another person. Within this context and in relation to sacramental confession, we cite the *Book of Common Prayer*, which mandates that confidentiality is “morally absolute for the confessor, and must under no circumstances be broken” (p. 446). This mandate is supported by the Clergy–Penitent Privilege in California Evidence Code Section 1032, which defines a penitential communication as

... a communication made in confidence, in the presence of no third person so far as the penitent is aware, to a member of the clergy who, in the course of the discipline or practice of the clergy member’s church, denomination, or organization, is authorized or accustomed to hear such communications and, under the discipline or tenets of his or her church, denomination or organization, has a duty to keep those communications secret.

In general, California Evidence Code Sections 1033 and 1034 give both the person who makes a sacramental confession and the confessor the legal right to keep it secret.

At the same time, there may be occasions when the cleric involved may properly exercise discretion in violating such confidentiality when there is grave danger of harm to the protected person or to another person.

When clergy learn of abuse in the sacramental Rite of Reconciliation, where the obligation to confidentiality is morally absolute, they may well be advised to consider urging self-disclosure as part of the counsel that precedes absolution, and under certain circumstances even withholding absolution until such self-disclosure is accomplished as a sign of penance and radical amendment of life.

Clergy are urged to seek wise and informed counsel to help them work faithfully, legally, and with integrity in this important and difficult area.

9. Comply with legally mandated reporting requirements regarding the suspected abuse and/or neglect of children, the elderly and vulnerable adults

In California, clergy are legally mandated reporters of suspected abuse and/or neglect of children and of elders and dependent adults. This is not a choice, but a legally enforceable responsibility. The diocese requires its clergy to be familiar with state law, as follows. Questions or need for clarification should be directed to the bishop's office.

The legal obligation of mandated reporting requires clergy to disclose information to the appropriate state agency in specific situations, except when the cleric learns the information within the bounds of the sacrament of confession.

Sections 11165.7, 11166, and 11166.05 of the California Penal Code provide:

- a. That members of the clergy are mandated reporters (“clergy member” means a priest, minister, rabbi, religious practitioner, or similar functionary of a church, temple, or recognized religious denomination or organization”);
- b. That knowledge or reasonable suspicion of child abuse acquired during a penitential communication is exempt from the mandate to report;
- c. That “penitential communication” is defined as a “communication, intended to be in confidence, including, but not limited to, a sacramental confession, made to a clergy member who in the course of the discipline or practice of his or her church, denomination, or organization is authorized or accustomed to hear those communications, and under the discipline, tenets, customs or practices of his or her church, denomination, or organization, has a duty to keep those communications secret”;
- d. That “nothing in this subdivision shall be construed to modify or limit a clergy member’s duty to report known or suspected child abuse when he or she is acting in some other capacity that would otherwise make the clergy member a mandated reporter”; and
- e. That clergy members are permissive child abuse reporters for mental or emotional abuse.

10. Refer issues of mental health, and substance and domestic abuse issues to licensed, insured or certified health providers

The line between pastoral care and more specialized care can sometimes be blurry. Clergy are advised to develop their own list of referrals for mental health and substance abuse or domestic abuse problems and to rely on these experts for support and referral. Clergy who are licensed or certified are not to treat anyone who is a member or attends a parish in which the cleric is serving.

In general, clergy should refrain from meeting with parishioners more than three times before referring them for specialized care. The exceptions to this guideline are spiritual direction, pre-marital counseling and general pastoral care, which clergy offer routinely both formally and informally in the course of their ministry. Please consult with a member of the bishop's staff if you need clarity in making decisions to refer.

11. Comply with the responsibilities of being an employer

Clerics in charge of paid staff, wardens, members of personnel committees and similar positions are expected to conduct personnel matters in fair, impartial and compassionate ways. This includes making decisions regarding hiring, supervision, record keeping, and termination, either for cause or due to financial restrictions. It also includes responding to any and all allegations of misconduct by employees in a timely and appropriate manner. Information about the role of employer can be found on the diocesan website —

www.diocal.org/governance/finance-administration/general-finance-administration.

12. Comply with financial practices as set forth by the Diocese of California and The Episcopal Church

This includes conducting an annual audit of all accounts, including clergy discretionary and special ministry funds, and ensuring that the financial systems within your congregation, such as money counters and those authorized to sign checks, are in accordance with the internal practices recommended by the diocese and The Episcopal Church —

www.diocal.org/governance/finance-administration/general-finance-administration.

Discretionary funds: discretionary funds are never to be used for personal gain or benefit; diocesan and parish guidelines must be strictly followed.

- a. Any money given to a cleric either must be reported as income (as prescribed by the IRS) or deposited in a discretionary fund. (If the congregation or other

organization has a rule against gifts, this does not apply.)

- b. Any contribution or gift in excess of \$500.00 must be reported to the treasurer of the congregation or organization.

No cleric or lay leader should use his or her influence with members of the Church for personal financial gain, or engage in some enterprise which would derive benefit from his or her connection with the Church (e.g., selling the parish list).

13. Bring resolution to relationships with parishioners when ordained ministry at a parish ends

When it comes time to leave a parish, it is expected that clergy will bring resolution to relationships with all parishioners in a manner that is healthy for the cleric and the cleric's family, as well as for the congregation.

It is expected that once a cleric's service at a parish ends, he or she will no longer perform any clergy functions for any members of that congregation or others affiliated with the congregation, and will not worship at that parish. In addition, it is expected that the cleric will not communicate with former parishioners about matters involving the congregation, and will not meet with any members of the congregation for any reason during the interim period, and until new ordained leadership is fully integrated into the life of the congregation. It is customary and advisable to ask permission of the new ordained leadership or the Canon to the Ordinary if there is a question regarding this.

A special word for interims and for their congregations: it is common for an interim and congregation to "fall in love" with each other and to lose sight of the reason and the importance for a well-defined and limited interim period. It is expected that interim clergy adhere to the guidelines for leaving the congregation given by the Interim Ministry Network (www.imnedu.org) and to work with the congregation to facilitate a good leave-taking.

14. Participate in diocesan events

It is a diocesan expectation that clergy attend diocesan convention and other regular diocesan events such as Clergy Retreats/Conferences. New clergy and clergy in transition are required to attend Fresh Start groups provided by the diocese. Participation in ordinations and celebrations of new ministry are strongly encouraged.