

# The Anglican Diocese of Ottawa

## Clergy Self-Care Guide

*The following articles have been written for clergy by clergy. They are intended as guidelines only, not as rules or regulations. It would be impossible to comment on every conceivable situation that might arise. That is where discretion has to enter. The exercise of common sense and good judgement, however, should solve most problems.*

### Clergy Self-Care

Because we love and are committed to our work as Deacons, Priests and Bishops, we have vowed to pattern our lives (and those of our families, households, or communities) in accordance with the teaching of Christ. One part of this commitment is to care for God's gift that we embody. By so doing, we proclaim, in deed as well as word, the Gospel of Jesus Christ. These are some of the ways that we express this stewardship:

1. We give adequate attention to our spiritual health, observing daily times for prayer, scripture reading and meditation, and time for spiritual direction, confession, and regular retreats.
2. We give adequate attention to our physical health, including regular physical exams, regular exercise, healthy eating habits, moderation or abstinence in the use of tobacco or alcohol, and abstinence from illegal drugs.
3. We give adequate attention to our emotional health, which includes establishing and maintaining supportive relationships outside the congregation, institutions, or chaplaincies we serve.
4. We spend intentional and significant time with our family, household and community.
5. As individuals, we seek avenues of community involvement and appropriate friendships that allow us to relate to others independent of our professional roles and responsibilities.
6. As professionals, we acknowledge the importance of identifying and observing healthy emotional and physical boundaries.

7. Because of the nature of our work and our efforts to be available at all hours for emergencies, and because clergy regularly work nights as well as days, we try to observe these standards: (a) at least eight days off per four-Sunday months, and ten days off during any month with five Sundays; (b) national and civic holidays observed by the Diocese. (Days off and holidays may accumulate only during the year in which they occur.)
8. As traditional and customary, we observe annual vacation as time for recreation and renewal.
9. We maintain a regular practice of continuing education and, in consultation with the Bishop, clergy colleagues and our congregations, plan for periodic study leave.
10. At least every two years, we give concerted effort to an examination and evaluation of our personal, professional and vocational development.
11. We share in the wider work of the Diocese and support our colleagues in ministry by participating in inductions, ordinations, meetings of deanery clericus and Great Chapters, Synod Meetings, Clergy Conferences and information days, committee work, and other activities outside the parish. Overall, such involvements should not take more than an average of one day a week.
12. We practise responsible stewardship of our financial resources. We accept the tithe as a minimum standard of giving and, if not already tithing, will adopt a plan of moving toward that minimum.

## **Stress**

Clergy are responsible for finding ways to live healthy and balanced lives. Like everybody else, there are any number of sources of stress that can endanger our well-being. Left unchecked, the effects of stress can spill over into life at home or at work, also endangering the well-being of other entrusted to our care. Recognizing stress and knowing when it is affecting our ability to minister as wholesome examples to the flock of Christ is the first step in dealing with stress in an effective manner. Knowing how to deal with stress increases the ability to stay healthy and balanced when situations, people, or events are excessively demanding.

### **Sources of Stress**

Stress can originate from a variety of sources. Examples of common stressors include the following:

- death of a spouse, close family member or friend; injury or illness involving oneself or a loved one
- divorce, separation or marital reconciliation; arguments with one's spouse or other family difficulties
- changes in responsibilities, increased work load or seasonal demands
- beginning a new ministry, moving to a new home or other changes in living conditions
- uncertainty about employment or vocation
- difficulties in the parish, significant trauma or changes in parish life
- trouble with parishioners, complaints about one's ministry
- marriage, gaining a new family member
- changes in personal habits or other activities
- personal, legal or financial difficulties, incurring debt
- isolation, loneliness, poor self-esteem

## **Recognizing Stress**

Learning to recognize the symptoms of stress can enable clergy to find positive ways of dealing with stress. Symptoms of stress include spiritual, physical, emotional, behavioural, and cognitive manifestations. Symptoms often involve changes in normal habits or patterns, such as:

- withdrawal from prayer or other spiritual disciplines; cynicism or apathy about faith, ministry, or the church
- fatigue, tremors, headaches, weakness, changes in frequency of urination or bowel movements, other specific or non-specific physical complaints, lingering illness
- feeling overwhelmed, anxiety, guilt, grief, denial, fear, loss of emotional control, depression, intense anger, irritability, agitation
- emotional or physical outbursts, withdrawal, being uncommunicative, inability to rest, insomnia, compulsive behaviour, disregard for personal safety, increased use of alcohol, tobacco, or self-medication
- blaming others, confusion, heightened or lowered alertness, obsessive thinking, rumination, poor problem solving, difficulty making decision, avoidance

## Dealing with Stress

Although stress is part of life, its negative effects can be controlled. If clergy recognize in themselves several of the symptoms just listed, they must turn to some strategies for dealing with stress; for example:

- Attend to prayer, remembering that prayer to God begins with the love and compassion of Christ surrounding all that we are whether or not we have words to speak; remember the promise of the Holy Spirit.
- Talk to people who care about you, those who will listen; share your feelings and your hardships.
- Consider whether some things can be changed to reduce the pressure; try to decide whether the stressor can have benefits.
- Lower expectations; set realistic goals, consider what is truly important and let the rest be for awhile; reduce the number of events going on.
- Avoid thinking about how much you are doing; focus on things that are positive and are going well.
- Eat and exercise properly; get enough sleep; do things that relax you; give yourself a break.
- Avoid alcohol, tobacco, or self-medication.
- Do things that get your mind off yourself.
- If the symptoms of stress seem serious or persist, consult a skilled person, possibly a spiritual advisor, a counsellor, or a physician. Do not wait until a crisis demands a response.

## **Single and Ordained**

To keep our affirmative response to our ordination vow, "Will you do your best to pattern your life (and that of your family) in accordance with the teachings of Christ, so that you may be a wholesome example to all people?", we will address the issues and areas of concern peculiar to single life. As with our discussion/guidelines for clergy well-being, the issues are common to us all. In the case of the single cleric, awareness, understanding and support of colleagues can be invaluable.

### **Intimacy**

As clerics talking and preaching about the need for community, how does the single cleric meet those needs? The feelings of isolation and loneliness that can be common to clerics may be compounded for the single cleric. How do the single cleric's needs for intimacy – for love, affection and companionship – get met? In a remote community, this problem can be even more difficult as options are more limited. It is necessary to choose carefully one to talk with or have as a confidant/friend. Caution is also necessary in the context of dating/social life. Although romantic relationships may develop between single clerics and persons whom they meet within their congregations or other areas of church service, clergy members must always be mindful of the risk these relationships may create. If the cleric is intentional about pursuing such a relationship, appropriate boundaries must always be observed. The counsel of someone outside the church structure, within a professional/counselling relationship can be helpful and is recommended. In addition, we abide by the 1997 Statement by the Anglican Bishops of Canada concerning Human Sexuality.

### **Boundaries**

Boundaries for all clergy are an appropriate concern. This concern for the single cleric has a different nature. For many of us inclined toward working more hours than may be healthy, the boundary of time for work vs. time for self is easily lost. This problem/concern can also be confused with the concern of self-worth. For the single cleric, finding balance and purpose in life aside from our work is imperative. Perceived boundary issues within a congregation also need to be addressed; for example, often the single cleric is perceived as having more time available for the pastoral concerns and social activities of the parishioners. The community we serve needs to know that we are not and indeed cannot be always at their beck and call.

Boundaries in relationships are also an area of concern. For the single cleric, finding and maintaining healthy relationships both in and out of the workplace can be difficult. It is important to develop relationships that can provide a sense of openness, sharing and fun outside the community in which the ordained person serves.

## **Married and Ordained**

To keep our affirmative response to our ordination vow, "Will you do your best to pattern your life (and that of your family) in accordance with the teachings of Christ, so that you may be a wholesome example to all people?", we will address the issues and areas of concern peculiar to married life.

### **Intimacy**

To be a wholesome example, most of our needs for intimacy – needs for love, affection and companionship – must be met within our marriage. This is not something that always comes naturally to each one of us. A good marriage requires regular communication, time, energy, and a willingness to be vulnerable with one's spouse. It is important to bring much of our thinking and feeling back into our marriage.

### **Boundaries**

We must always maintain healthy boundaries around our work. We need to give our spouses and families the same kind of priority and care that we give to those we serve, even when it is not comfortable and perhaps seems less rewarding than work seems to be. We need to monitor our relationships with the leadership in the parish/institution, not turning to them on a regular basis for the emotional and spiritual support that a wholesome family can provide. Keeping in mind that church functions, no matter how well planned and executed, are not always appropriate places for clergy families to be open, honest or genuine with their feelings, we need to provide opportunities for our spouses and children to grow emotionally and spiritually outside the parish the ordained person serves.

The community we serve needs to know that we are not and indeed cannot be always at their beck and call. Additionally, the spouse and family of the clergy person need to know that family activities are a priority and may not be interrupted except for an emergency.

It is important to develop relationships that can provide a sense of openness, sharing and fun outside the community in which the ordained person serves.

## **Sexual Boundaries**

### **Preamble**

We acknowledge the goodness of our nature as sexual beings. Feelings or attraction are human and good, ordained by God and revealed to us in such diverse passages from Holy Scripture as the creation stories in Genesis and the love poetry of the Song of Songs. These feelings can enhance our relationships with others. They can also become destructive to those relationships when allowed to range beyond accepted norms. Acting out on blurred physical and emotional boundaries may break our relationship with God and can be crippling and destructive to our ministry.

By virtue of the canons of the Anglican Church and, more importantly, by their baptismal and ordination vows, clergy are charged to love, serve, and nourish others and to be models for Christian living. Thus clergy are to treat each other and members of their congregations, other staff members, and all in need who come to them, in such a manner that they may experience the healing ministry of Christ and be received with the same care and dignity our Lord showed to those who came to him. We all fall short of this model, but it remains the standard that we have vowed to uphold.

### **Sexual Misconduct**

Sexual misconduct encompasses the sometimes unwarranted use of power, a disregard for another's dignity, and the betrayal of the trust and integrity of the pastoral and professional relationship. Examples of this behaviour include, but are not limited to, sexual intercourse, kissing, the touching of breasts or genitals, verbal suggestions of some possible sexual involvement, or sexually demeaning comments. Any of these activities, when directed toward a minor, is sexual abuse and subject to prosecution as a misdemeanour or a felony under civil law.

Because an imbalance of power exists between clergy and a parishioner in a pastoral relationship, it is imperative that clergy establish and maintain clear boundaries. It is also important that clergy not allow themselves to be lured into relationships in which they are unable to maintain clear boundaries.

## Guidelines

Clergy, then, are responsible for knowing and complying with these standards:

1. Clergy are to be cognizant of the power differential existing between themselves and others and are not to exploit or allow themselves to be exploited.
2. Clergy are to be aware of the danger signs that could indicate an inappropriate breakdown of one's sexual boundaries: excessive self-disclosure by either the clergy or the parishioner/ excessive availability; giving and/or receiving inappropriate gifts; excessive touching; undue anticipation of future visits, including rearrangement of one's schedules; fretting about clothing and appearance when meeting the other; meeting at unusual or out-of-the-way locations; keeping secrets that go beyond the requirements of professional confidentiality; and continued fantasy about the other.
3. Clergy are to be aware of the potential power that sexual attraction between themselves and other staff members (clergy and lay) has for crippling ministry, and they are to develop appropriate staff relationships for the benefit of their several ministries.
4. Should a clergy person become aware of any of these danger signals, he or she is encouraged to seek immediate professional help. In addition, he or she might well benefit from some self-examination by asking these questions:
  - a) What can I learn about myself from the experience of being drawn to this other person?
  - b) What is missing in my own life, or in my marriage, or in other relationships that an involvement with this person might satisfy?
  - c) What is there about my life and ministry that makes me vulnerable to falling in love outside my commitments.
  - d) Do I need to resign voluntarily from active ministry until such time as the present situation has been resolved and in order not to create a scandal in the church?
5. Clergy are responsible for seeking advice and counsel from appropriate and qualified person should they find themselves at risk of acting inappropriately on sexual or romantic attractions.

6. Clergy must always remember that there may be sexually aggressive, even predatory, persons among parishioners who seek them out and attempt to engage them in behaviours that are destructive to all concerned. Counsel and advice should always be sought in such situations. The Bishop needs to be advised, and, if deemed appropriate, confidential legal direction may be necessary. Entrapment is always a possibility, and clergy need to be particularly aware of it.
7. Clergy are responsible for knowing and abiding by diocesan policies and disciplines. All clergy are responsible for having read and understood the **Diocese of Ottawa Sexual Misconduct Policy**.
8. In instances where sexual misconduct by clergy has been alleged, we agree to refrain from conversations about the issue; allegations, so long as they remain precisely that, can destroy persons who may be innocent.

# Clergy Confidentiality

## Assumptions

1. At the heart of our concern are three values: the integrity of the church as institutions; the well-being of all people; and, in particular, the well-being of clergy. The integrity of the church demands that certain subjects of conversation be kept confidential, but the well-being of clergy demands that they share and consider all sorts of concerns with colleagues and other professionals.
2. *Secrecy* has to do with keeping something hidden or concealed. This is rare in church activities. *Confidentiality*, marked by trust and intimacy, means to be entrusted with confidences. *Privacy* has to do with seclusion and a state of being apart from observation. In this paper, a secret is that which cannot be divulged (e.g., a confession); a confidence, or confidential conversation, is something that, under normal circumstances, is not generally disclosed to another person (e.g., counselling); and a privacy, or private conversation, is simply a conversation held without others present, the content of which may be further disclosed should circumstances warrant (e.g., church administrative matters).
3. It is helpful to refer to the old model of the three-legged stool of Scripture, tradition, and reason. The Bible is silent on the issue of confidentiality and secrecy in the context of pastoral care. There is little guidance in Canon Law or in the *Book of Common Prayer* about issues of confidentiality. The *Book of Alternative Services*, however, does direct, solely in the context of sacramental confession, that "The secrecy of a confession is morally absolute for the confessor, and must under no circumstances be broken." (p. 166) Furthermore, in our pastoral practice, we often use expectations and guidelines from other aspects of our own or other ecclesiastical traditions as is necessary and helpful. At times, the practices of psychologists or social workers, other professions with rules of confidentiality, can also be helpful guides to Anglican clerical practice.
4. What follows here is written by and for clergy, and therefore does not attempt to explain itself to others. Although certainly not secret or confidential, it is not meant for wider distribution or use. It should be read as a statement of understanding and intent rather than as something prescriptive.

## Confidentiality

*Trust* lies at the heart of the pastoral activity of the clergy of the church. This trust is learned by clergy through the process of formation, in the church before theological training, in seminary, and continuing through one's career. Trust is also something that is given to clergy by the laity and other clergy of the church. It is a form of confidence, dependability, faith, and strength that others become aware of through contact and familiarity. Trust is not a character that is granted at ordination, but something grown into by clergy through their ordained lives.

To gain some trust of a community of faith, clergy must learn appropriate standards of behaviour in regard to sharing personal information with others. In its worst form, this can be known on the one hand as gossip, and on the other hand as a rigid exclusion. In its best forms, sharing of personal information can be seen as supportive of individuals within the community of faith, and an attempt on the part of clergy to serve their people. There are, therefore, no hard and fast rules by which one may gauge the appropriate levels of disclosure. The entire situation is confused by a tangle of legal principles and statutes that seem at times to allow great latitude on the part of the clergy and at other times to provide only dilemmas. There is, in the end, only good sense and the good counsel of one's colleagues to depend on. It is imperative that clergy be in conversation with their colleagues in ministry and other professionals about issues of confidentiality.

There are three types or conditions of disclosure. In the first place, our tradition holds that any form of *confession* is absolutely secret. Also, on occasion, we encounter circumstances that require the utmost secrecy. In the second place, we are often asked in our pastoral care to keep confidences. This trust is placed upon us in order to help others attain to the full stature of Christ. Therefore, it may be appropriate to engage in what social workers call "agency confidentiality," wherein a colleague may be consulted so that the individual involved may be better helped. In the third place, certain private matters are often placed before us, in which secrecy is kept for a short time for specific reasons, or in which administrative or other institutional concerns are addressed. It is assumed that congregations and diocesan organizations will adopt their own procedures for handling such matters as are appropriate to their tasks.

The issue becomes more complicated in daily ministry when we encounter those persons who are so dysfunctional and manipulative that confidentiality becomes a means of control rather than a means of growth. Clergy need to build enough diagnostic skills to be able to identify such destructive behaviour and to have the strength and determination to confront it and not be controlled by it. It is in these cases that collegiality is of utmost importance, so that the clergy can continue to act freely as representatives of Christ's Body, the church. It is, of course, extremely dangerous to presume that one's sole judgement is always dependable. Referral is an option to be valued and used regularly.

Finally, we understand that at the heart of the mission of the Church of Christ is the goal of restoring all persons to unity with God and each other in Christ. This is done by regular worship of Almighty God, and the proclamation of Good News in justice, peace, and love. Therefore, upon considered judgement, confidences may be broken when circumstances warrant, and especially when the life or well-being of one of God's people is threatened or degraded. Thus, we can affirm that when a person presents themselves to us and threatens harm to themselves or another, we may need to act to protect the threatened person, and to make certain that we convey to the person our intent to act in accord with our beliefs and values.

The relationship of trust between clergy and people is one of growth and formation. It is a relationship in which confidence (literally, *with faith*) is a critical characteristic. Clergy, being entrusted with the deepest concerns and most personal affairs of human beings, need to be aware of the power, weight, and responsibility they bear. They do this best in a community of faith that is marked by openness, appropriate boundaries, and mutual support.

## **Discretionary Funds**

Discretionary funds have a long history of customary uses. In the Anglican Church, the clergy-in-charge often has available a fund over which she or he has sole control. The assistant clergy may also have access either to the rector's discretionary funds or funds created by the authority of the rector and vestry and under the control of the assistant clergy. The sources of discretionary funds vary widely and may include a contribution from the personal funds of the cleric. In any event, it is improper to mingle personal funds of any kind with discretionary funds.

Regarding the use of discretionary funds, two facts should be considered. First, the discretionary fund is not, nor was it ever intended to be, the personal property of the rector or priest-in-charge. These are monies that belong to the parish or mission, and are entrusted to the rector or priest-in-charge, or a designated lay person, for proper distribution. Second, although much that we do is controlled by Canon Law, we are also subject to civil law, including income tax law.

With regard to taxes, these general principles may help clarify what follows:

- a) Money flowing from a church to the priest for the priest's personal use is generally taxable as income to the priest.
- b) Money given in exchange for services is taxable as income.
- c) Gifts are deductible only if given to an exempt organization, but not if given to an individual, either directly or indirectly.

## **Guidelines**

With this in mind, the following guidelines and statements may be helpful.

1. The use of discretionary funds may vary according to parish customs or decisions of Parish Councils. Generally speaking, discretionary funds may be used for any legitimate church purpose. It is a better practice, however, for business expenses of the clergy to be paid by the church in the form of an expense account or an expense allowance, and not be funded through discretionary funds.
2. Because discretionary funds are the property of the mission or parish, gifts to them should be made to the church rather than to the individual. A gift to the church is deductible; a gift to the priest is not.
3. A gift to the discretionary funds must either be unrestricted or, if restricted, must be designate for one of the legitimate purposes of the church.

4. A gift to a priest, not payable to the church, is not deductible by the donor. Further, if given in return for services rendered, such as for weddings, funerals, etc., it is taxable income to the priest.
5. It is possible for an individual to make a personal gift directly to a priest. It would not be deductible to the donor and would not be income for the priest.
6. Because discretionary funds are the property of the church, they should, along with any articles purchased with discretionary funds, remain at the church when the priest is appointed elsewhere.
7. Discretionary funds should employ the same standard of bookkeeping and accountability procedures as other church funds. To ensure accountability, larger discretionary funds may be set up in a separate bank account. This account should bear the tax identification number of the church rather than the social insurance number of the priest. All gifts intended for discretionary funds should pass through the account. When funds disbursed are confidential in nature, a cheque may be written to cash. The priest should keep a private record, however, of the exact purpose of such a cheque. This is a protection in the case of a Revenue Canada audit, and is also a protection if questions arise within the parish. Because these funds belong to the church, arrangement should be made for a private review of this account in conjunction with the annual audit of the parish.
8. It is not advisable to use discretionary funds as petty cash funds, nor should professional expenses of the clergy be paid from discretionary funds. All business-related items that are paid by discretionary funds intended for the personal use of the priest and not to be used by subsequent incumbents, shall be reported as personal income by the priest, with a deduction taken as business expense. Because of the limitation upon deductions of business expenses, this technique raises the priest's expenses. Valid expenses for the priest's ministry should be paid by the mission or parish and not run through the discretionary funds.
9. The person administering discretionary funds is in a position similar to that of a trustee. She or he is handling funds that are not her or his property. That person is, therefore, obligated to do so with a high degree of care, not to waste the funds, not to let them be commingled with personal funds and, finally, to use them for the purposes for which they were entrusted to his or her care.