

FOREWORD

In the past two hundred years many South Africans in various ways have looked to the Churches to provide direction in their lives and to help them in the understanding of the deeper meaning of life. Catholic Sisters, Brothers and Priests (and more recently, Deacons and lay Church workers) have been a very significant influence not only on the lives of Catholics but of people generally.

It has been our privilege to have been with people in times of their deepest sorrows and pain as well as in the most joyful moments of their lives. As we have sought to minister God's love to them we have glimpsed something of the sacred in our people. At the same time, we are aware of our own humanity and that often we ourselves are "wounded healers".

Sadly, in many parts of the world and no doubt in Southern Africa, it has become apparent that the great trust placed in clergy and religious has not always been respected. Such a betrayal of trust has caused untold damage to innocent victims, to their families, to parish communities and to other "secondary victims". All clergy and religious have in some way borne a part of the collective guilt for the offences of their colleagues; many are now confused and left wondering how to engage in their ministries with integrity while still maintaining a close and warm contact with their people.

In many ways, religious and clergy are being asked today to walk a very fine line. Much of the spontaneity and familiarity, which have characterised pastoral ministry in the past are just not possible in the current climate. At the same time it would be a tragedy if clergy and religious were to withdraw from significant relationships with

people. Yet we are sure that everyone would agree that

abuse in all its forms, and especially sexual abuse, must be condemned and every step must be taken to prevent further occurrences.

For over four years, the Professional Conduct Committee of the Bishops' Conference worked on an appropriate response to accusations of Child Sexual abuse by Church personnel. The Committee produced a Protocol which was approved by the Conference in January 1999.

The SACBC then commissioned the Professional Conduct Committee to draft a document on ethical standards for all Church personnel. During 1999 and 2000, a draft of *Integrity in Ministry* was discussed with the Southern African Council of Priests, the Major Superiors and Formators of Religious congregations and with the Bishops' Conference. It was formally approved by the Conference at its Plenary session held in January 2001 as its *Code of Professional Responsibility for Priests, Religious and Lay Church Workers in the territory of the SACBC* (resolution No.10.1).

Integrity in Ministry aims to give our Catholic Church personnel a set of standards which will enable them to exercise their pastoral ministry in an environment which is both safe and conducive to growth. In such an environment our people will be helped to experience the love of Jesus, the Good Shepherd.

It is our hope that *Integrity in Ministry* will be an instrument of healing within our Church and point us in a direction which will enable us all to be true to the person and mission of Jesus.

The Professional Conduct Committee of the SACBC

PREAMBLE

For whom is this Document of Ethical Standards intended?

Integrity in Ministry is a Document of Ethical Standards for all Catholic clergy, religious and church lay workers in Southern Africa.

Context

People reasonably and properly expect that when associating with religious and clergy - especially in pastoral relationships - they enter a field of security. They place trust in clergy, religious and church lay workers, and expect clergy to be persons motivated by the love of God, and to be people who respect the dignity of all.

The unethical actions of some clergy and religious amount to a betrayal of this trust and have caused great damage. In response to this situation the SACBC, after widespread consultation, established a Professional Conduct Committee. This Committee decided to develop a code of conduct for clergy, religious and church lay workers in Southern Africa.

Aim

The aim of this Document of Ethical Standards is to help religious and clergy to develop and maintain the highest standards in pastoral ministry. This process is also intended to support religious and clergy as they strive to live their vocations fully, providing them with a framework to examine their ministry and evaluate their behaviour.

Objectives

This aim will be achieved through the fulfilment of several key objectives of this Document of Ethical Standards, which are:

- to promote justice and integrity in all aspects of the practice of pastoral ministry;
- to protect children and adults from abuses of power, especially sexual abuse and harassment;
- to facilitate self-care among clergy, religious and church lay workers;
- to ensure clergy, religious and church lay workers are more visibly accountable;
- to reinforce to clergy, religious and church lay workers who have abused or who may sexually abuse children or adults that such behaviour has no place in ministry and will not be tolerated;
- to offer religious and clergy a pastoral framework to protect them from false accusations of unethical behaviour as much as possible; and
- to enhance the public credibility of religious and clergy and church lay workers.

Pastoral Relationships

In the context of vocation, clergy, religious and church lay workers enter into a *covenant relationship* with the People of God. It is a relationship modelled on God's *steadfast love and faithfulness*¹, to commitment of the *Good Shepherd* to leave the ninety nine and seek out

¹ See Deut 7: 7-8; Exodus 34:6; and Is.43:1

the one that is lost.² Religious and clergy exercise many and varied roles in response to this mission; they offer specialised knowledge and skills in response to fundamental human needs. The knowledge and skills offered by clergy, religious and church lay workers continue to be respected and called upon. What is being demanded of religious and clergy is that they remain accountable to the highest standards in ministry, as servants of the community of disciples.

Values

The following Document of Ethical Standards is an open hearted response to this just demand. *Integrity in Ministry* is based upon Gospel values. The point of reference for understanding and living these values is Jesus Christ, who is “the way, the truth and the life”.³ Living by and reflecting on pastoral practice in light of gospel values should result in one saying with St Paul, “Life for me, of course, is Christ”.⁴

Structure

The ethical standards set out in this Document of Ethical Standards are prescriptive (indicated by use of the word *shall*). They are designed to ensure minimum standards and the protection of those whom clergy, religious and church lay workers serve.

² Luke 15: 4-8

³ John 14:6

⁴ Phil.1:21

Following each standard is a list of behaviours which are either mandatory or indicative. The small number of mandatory behaviours are clearly named as such and must be complied with by all clergy, religious and church lay workers.

1. Proclaiming the Reign of God

Inspired by faith, clergy, religious and church lay workers seek to live God-centred lives, which proclaim the Reign of God for all to hear.

Christian faith professes belief in the infinite goodness and holiness of God and that all reality has its origin and purpose in God. Religious and clergy should live lives for God with Christian hope that God unconditionally wills salvation to all. The call to salvation is ultimately a call “to be saved by the Spirit who makes us holy”.¹ Clergy, religious and church lay workers should exercise their pastoral ministry in ways which repeat this call, time and again.²

- 1.1_ Clergy, religious and church lay workers shall, in ways appropriate to the circumstances of their pastoral ministry, preach the word of God seriously and earnestly.³

Commitment to this standard would be indicated by:

¹ 2 Th.2:13

² Cf. John Paul II, *Vita Consecrata*, art 33; *Pastores Dabo Vobis*, art 15.

³ Code of Canon Law, c.762

- explanation of Christian teaching in a manner that is suited to the circumstances of one's hearers;⁴
- continuing development of one's public-speaking skills;⁵
- thorough preparation for the giving of reflections and catechesis;
- thorough preparation for the preaching of homilies;
- thorough keeping up to date on local and international affairs;
- modelling in one's life the proclaimed message.

1.2 Religious and clergy in pastoral ministry shall seek to participate in and lead liturgies in ways that enhance the life of the community, and celebrate God's action within the community.

Commitment to this standard would be indicated by:

- continuing development of one's knowledge of liturgical theology and practice;
- conducting oneself with decorum during

⁴ Ibid., c.769

⁵ Cf. Ibid., c.279.3

liturgical celebrations;

- thorough preparation of liturgical celebrations together with the liturgical committee;
- respecting the role of the laity;
- never abusing the considerable power exercised in the pulpit;
- involving the laity in liturgical inculturation.

1.3 In their pastoral ministry, clergy, religious and church lay workers shall recognise the significance, dignity and power of the sacraments.

Commitment to this standard would be indicated by:

- supporting and participating in processes that prepare people to celebrate the Sacraments;
- diligently fulfilling the requirements of canon and civil law with regard to applying for dispensations, lodging notifications of an intended marriage and the registration of marriages;
- priests celebrating the Sacrament of Reconciliation only in places where both priest and penitent are visible to others;⁶

⁶ Code of Canon Law, c.964.2

- keeping up to date all records required by Canon Law, especially those of Baptism, Confirmation and Marriage;
- being available at specified times for the Sacrament of Reconciliation.

1.4 Religious and clergy shall seek to become and remain competent as theological resources for the believing community.

Commitment to this standard would be indicated by:

- on-going development of one's knowledge and understanding of Scripture and the Church's tradition;⁷
- learning reflective techniques and sharing the fruits of one's learning with other;
- remaining well informed about social and cultural developments.

⁷ Code of Canon Law, c.279.3

2. Commitment to Vocation and Calling

With openness and honesty to self, religious and clergy should live lives of ongoing commitment to their vocations.

All disciples are called to focus exclusively on the coming Reign of God; they are to journey “the way” with Jesus.⁸ In their pastoral ministry, clergy, religious and church lay workers should be committed to this journey of development and growth. They continually recommit themselves to the promises of ordination and/or the vows of religious profession, and therefore to the work of proclaiming and serving God’s Reign.

2.1 Through spirituality, reflection, planning, action and evaluation, clergy, religious and church lay workers shall seek to develop and grow as pastoral ministers both individually and as members of a Pastoral Team.

Commitment to this standard would be indicated by participation in at least one of the following support processes:

- professional supervision;
- a one-to-one support relationship with a colleague;
- specially formed support groups;

⁸ Cf. Luke 9: 57-62

- an enhanced existing support group or programme (e.g. [for religious] community meetings; [for clergy] the Ministry to Priests programme; a fraternity of clergy), which shall also take account of cultural needs;
- participation in continuing formation programmes⁹;
- establishing and applying processes to evaluate the quality of one's ministry, including the assessment by one's peers and those one serves;
- engaging in a process of self-appraisal with one's supervisor or superior;
- participation in local and national associations of one's peers¹⁰;
- developing and modifying personal life-plans on the basis of one's reflection and evaluations.

⁹ Code of Canon Law, c.279.2;
Pastores Dabo Vobis, Chapter VI;
Directory on the Ministry and Life of
Priests, Chapter III;
Vita Consecrata, art 69

¹⁰ Code of Canon Law, c.278

2.2 In order to meet their human needs for affirmation and affection appropriately, religious and clergy shall seek to develop relationships other than their pastoral relationships.

Commitment to this standard would be indicated by:

- development of a network of supportive peers and friends with whom one has no formal pastoral relationship;
- exercising prudence when establishing a dual pastoral-personal relationship, i.e., a personal relationship with any person with whom one has or has had a pastoral relationship, or a pastoral relationship with a close friend;
- declaring dual (personal-pastoral) relationships to one's support person or group and regularly reviewing how effectively the boundaries between the pastoral and personal have been maintained.

2.3 In all relationships clergy, religious and church lay workers shall give witness to chastity.¹¹

With regard to this standard, the following behaviours are mandatory for all clergy, religious

¹¹ Ibid., cc.277, 672. For married clergy, the listed mandatory behaviours apply with regard to all persons other than the cleric's spouse.

and church lay workers:

- avoiding actions or language that could reasonably be interpreted as sexually provocative;
- never seeking to initiate sexual behaviour;
- rejecting any invitation to participate in sexual behaviour;
- avoiding situations and relationships that place undue stress on one's ability to remain committed to the virtue of chastity.

2.4 In all human relationships religious and clergy shall act with integrity consistent with their vocation to proclaim God's Reign of steadfast love.

Commitment to this standard would be indicated by:

- never establishing a relationship through an abuse of power but rather in service;
- only establishing and maintaining relationships that one can speak of freely to others;
- only establishing relationships that are able to develop and mature within the context of Gospel values.

Religious and clergy should respect the inherent dignity of the person. Respect for others begins with respect for oneself.

Clergy, religious and church lay workers, recognising that each person is created in the image and likeness of God,¹² should treat all persons in a caring and respectful fashion. In this regard, clergy, religious and church lay workers should be particularly conscious to protect and respect the rights of children, youth and women. Religious and clergy should be mindful of individual differences and cultural and ethnic diversity. To all people with whom they come in contact, clergy, religious and church lay workers are called to offer their support in enhancing the individual's capacity and opportunities for change and self-determination.

Clergy, religious and church lay workers are in the privileged position of being welcomed into the lives of people at important moments and must be clear about the principles that guide their behaviour. Due to the breadth of pastoral relationships and the ease with which they can overlap with other relationships, religious and clergy should set and maintain clear boundaries between the pastoral and the personal.

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Gen.1: 27

In the use of touch, religious and clergy shall be particularly conscious to maintain clear boundaries. Touch is a powerful way of communicating and an important part of pastoral ministry. It is so powerful that encounters with God are sometimes analogously described as involving tactility. Also, the Gospels tell us again and again that Jesus healed people through touch.¹³ However, touch can also result in confused messages being communicated. It can even be used as an instrument of control, harassment or abuse. Prudence is a much needed virtue in determining when to use and when not to use touch in pastoral relationships. At all times, religious and clergy must be mindful of their responsibility to protect the welfare and rights of those they serve.

3.1 In pastoral ministry, clergy, religious and church lay workers shall seek to relate to people with respect, sensitivity and reverence.

Commitment to this standard would be indicated by:

- treating all to whom one provides pastoral support with patience and courtesy;
- avoiding all forms of discrimination;
- promoting the equality of women and men;

¹³ E.g. Matthew 8: 3,15

- challenging oppressive norms in every culture.

With regards to this standard, the following is mandatory for all clergy, religious and church lay workers:

- clergy, religious and church lay workers shall avoid any behaviour that could be interpreted as harassment.

Harassment encompasses a broad range of physical or verbal behaviour, including but not limited to:

- physical or emotional abuse
- public defamation of another's good name
- racial insults
- derogatory ethnic slurs
- unwelcome sexual advances or touching
- sexual jokes or sexual comments
- requests for sexual favours
- display of lewd or offensive materials.

Harassment can occur as a result of a single incident or a pattern of behaviour where the purpose or effect is to create a hostile, offensive or intimidating environment.

3.2 Religious and clergy shall exercise their ministry in an inclusive fashion.

Commitment to this standard would be indicated by:

- reaching out to people, especially those who feel alienated from the Church or marginalised within the Church;

- being sensitive to the diverse forms of spirituality in the Church;
- understanding and being committed to the principles of inculturation.¹⁴

3.3 In their pastoral ministry, religious and clergy shall seek to empower others, supporting each person to live the life to which God calls them.

Commitment to this standard would be indicated by:

- using language that indicates an understanding of and respect for the priesthood of all believers;¹⁵
- working in ways that respect different charisms, spiritualities, qualifications and ministries, and recognising their complementarity in the work of proclaiming the Reign of God;¹⁶
- avoiding the fostering of dependency or subservience among those one serves.

3.4 Clergy, religious and church lay workers shall respect the physical, emotional and

¹⁴ Cf. Vita Consecrata, art 80

¹⁵ Cf. 1 Peter 2: 9-10; Lumen Gentium, art 10

¹⁶ Cf. 1 Cor.12: 12-27

cultural boundaries appropriate to pastoral relationships with adults and minors.

Commitment to this standard would be indicated by:

- strictly following the rubrics with regard to the use of touch in celebrating the Sacraments of the Church;
- providing counselling only in rooms appropriately set up for such support;
- exercising prudence in initiating and responding to physical contact, such as giving a comforting hug or an affirming touch;
- exercising prudence in the use of language that expresses affection or regard;
- exercising prudence in the giving of gifts.

With regards to this standard, the following behaviour is mandatory for all clergy, religious and church lay workers:

- one shall never provide pastoral ministry in the sleeping quarters/bedrooms of one's community house, or of the presbytery/parish house.

- 13 -

3.5 Religious and clergy shall have a profound esteem for the personal dignity of children and youth.¹⁷

¹⁷

John Paul II, *Familiaris Consortio*, 27

Commitment to this standard would be indicated by:

- never staying overnight in the same room as a minor, even if there are two beds;
- never supplying or serving alcohol or any controlled substance to a minor;
- never administering corporal punishment to a minor.

3.6 Clergy, religious and church lay workers, respecting the rights of children and youth, shall be concerned that these rights are respected by all.¹⁸

Commitment to this standard would be indicated by:

- being aware of the causes and signs of child abuse or neglect, the steps to take to protect children, and the procedures to follow if abuse or neglect is suspected or observed;

18

Ibid

- being aware of any legal responsibilities under civil law, and of the Church's procedures in relation to the notification of child abuse or neglect;¹⁹
- availing oneself of training in basic and ongoing formation in the area of child protection.

4. *Commitment to Service*

¹⁹ Child Abuse Protocol of the SACBC

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fundamental concern of Jesus is living for others,²⁰ and a person is a disciple of Jesus through service of their fellow human beings. In the Gospels, service is a personal act; its origin and goal is love. Service occurs out of love for others, as the account of Jesus washing the feet of the disciples indicates.²¹ This is the service to which religious and clergy are called.

4.1 Clergy, religious and church lay workers are called to service of the people of God and shall recognise the unique power they have in pastoral relationships and seek to be “the last of all and the servant of all”.²²

Commitment to this standard would be indicated by:

- creative cooperation and harmonious relationships in the communities in which one lives and works;
- encouraging and supporting each member of the community in the fulfilment of their vocation;
- consulting widely, and seeking consensus, where possible, before taking important decisions;

²⁰ Cf. Mark 9:35; 10:43-45; Mt.20:26-28

²¹ John 13: 1-17

²² Mark 9: 35

- exercising great caution in the use of one's status or of institutional power, never using these for one's own advantage;
- sharing decision making responsibilities;
- avoiding the development of personality cults;
- creating environments where it is safe for others to offer constructive criticism.

4.2 Religious and lay leaders and bishops shall establish and maintain procedures and mechanisms that support clergy, religious and church lay workers to achieve the standards set in this Document of Ethical Standards, and should be examples of servant leadership in the Church.

Commitment to this standard is indicated by bishops and religious leaders providing clergy, religious and church lay workers with:

- clear written statements of duties and expectations;
- appropriate structures of mutual accountability;
- affirmation in their vocation and mission;

- 17 -

- fair and consistent treatment;
- healthy and safe working and living conditions;
- access to adequate emotional, spiritual and financial support;
- access to continuing training,

development and renewal;

- open and consultative appointment procedures, which are impartial and in response to the needs of the Christian community and the Church's mission;
- personnel management practices based on fairness and equity;
- reasonable and efficient avenues of redress against an improper or unreasonable administrative act.

- 18 -

5. *Commitment to Justice*

Religious and clergy shall work for justice for all people, particularly with and on behalf of vulnerable and oppressed individuals and groups of people. They are called to work "to bring the good news to the poor, to proclaim liberty to captives and to the blind new sight, to set the downtrodden free, to proclaim the Lord's year of

favour".²³

*Clergy, religious and church lay workers should promote the social justice teachings of the Church, mindful that the Church and its ministers must promote justice by example, beginning with the "purification and renewal" of the Church itself.*²⁴

5.1 Clergy, religious and church lay workers, assuming the role of servant-leader, shall provide those they supervise (e.g. as employer, director, team leader, coordinator, or member of a management board) with a work-place marked by justice.

Commitment to this standard would be indicated by:

- developing and utilising personnel selection, appointment and management procedures based on fairness and equity;
- negotiating with those with whom one works clear and mutual understanding of each person's roles, responsibilities and duties, including one's own;
- providing a fair minimum wage for all;

²³ Cf. Isaiah 61: 1-2

²⁴ *Lumen Gentium*, art 8.

- providing safe and healthy working conditions in line with National Labour legislation;
- providing proper access to training and development;
- providing fair rates of remuneration for skill, responsibility and performance;
- providing reasonable avenues of redress against improper or unreasonable administrative acts.

5.2 Religious and clergy shall be mindful that social justice is an integral dimension of the Gospel, which they strive to promote in their pastoral ministry.

Commitment to this standard would be indicated by:

- enhancing one's knowledge of the social justice teaching of the universal Church and of the Southern African bishops;
- remaining informed about the major social and ethical issues of the day;
- contributing to the public debate on social

- 20 -

issues, without entering into partisan politics;

- encouraging people to become involved in addressing the social and ethical issues of the day.

5.3 Clergy, religious and church lay workers shall accept that in justice they have certain responsibilities to their colleagues.

Commitment to this standard would be indicated by:

- participation in associations of one's peers at both local and national levels;²⁵ these need to be established where necessary in Southern Africa;
- seeking to support colleagues who appear to be in difficulty in their pastoral or personal life;
- respecting the pastoral ministry of one's predecessors;
- refraining from interference in the pastoral ministry of one's successors.

5.4 Religious and clergy shall act with integrity and fairness when receiving complaints of sexual, physical and emotional abuse.²⁶

²⁵ Cf. *Code of Canon Law*, c.278

²⁶ The following indicative behaviours are based on the principles set out in the Protocol document.

Commitment to this standard would be indicated by:

- asking the victim what needs to be done immediately to ensure that he/she feels safe from further abuse;
- explicitly assuring those alleging abuse that the Church is available to provide spiritual and psychological assistance;
- naming abuse as such, and assisting victims to move any blame from themselves to the offender;
- striving to assist in the psychological and spiritual healing of those people who, as well as the victims, have been seriously affected by incidents of sexual abuse - family, friends and community of both victim and offender.

With regards to this standard, the following behaviours are mandatory for all clergy, religious and church lay workers:

- ensuring that all complaints alleging sexual abuse are referred to the contact person designated under the church's document SACBC Protocol on Child Abuse;
- reporting allegations of abuse to the relevant public authority if this is requested or required;
- acting so as to ensure that the proper processes of civil law are not interfered with, whether such processes are in

progress or contemplated in the future.²⁷

6. *Developing and Maintaining Competence*
(This chapter needs to be read in conjunction with chapter 2)

²⁷ *The Protocol Document*

In response to their call to service of the community of disciples, religious and clergy exercise many and varied roles; they offer specialised knowledge and skills in response to fundamental human needs. The knowledge and skills offered by clergy, religious and church lay workers continue to be respected and called upon. Religious and clergy have a duty to continue to develop and maintain competence in pastoral ministry, and to act within the limits of their qualifications and ability.

Acting with competence not only implies a moral duty to bring reasonable skill and learning to pastoral practice, but also to recognise one's limitations. Humility about one's competence involves knowing the areas where one lacks expertise, not providing services in those areas, and being ready to refer people to colleagues or professionals with expertise in those areas. The failure to practise within one's limits potentially denies support of the highest possible quality to someone in need.

- 6.1 Clergy, religious and church lay workers who show aptitude for pastoral counselling should be given training. Refresher courses are necessary for updating competence.**

- 24 -

- 6.2 Clergy, religious and church lay workers shall not give advice on matters about which they are not competent, nor provide formal counselling to individuals or couples unless qualified to do so.**

Commitment to this standard would be indicated by:

- clarifying the context, purpose and

expectations accompanying a request for counselling, support or advice;

- understanding the counselling process and recognising one's limitations in this area;
- maintaining an awareness of the professionals to whom one can refer people with specific needs;
- assessing the needs of a person who seeks assistance with any complex personal or relationship problem, and then referring the person to an appropriately qualified professional;
- not using psychological tools/tests (e.g. Myers-Briggs, Enneagram), unless accredited and supervised in their use;
- diocesan structures for monitoring the development of competence in pastoral counselling and coordinating pastoral ministry.

- 25 -

6.3 In their pastoral ministry clergy, religious and church lay workers shall avoid dual relationships that could impair their professional judgement or increase the risk of exploitation.

With regard to this standard, the following behaviours are mandatory for all clergy, religious and church lay workers:

- not giving gifts to persons to whom one is

providing counselling, advice, or emotional support, not to persons for whom one is acting as spiritual director;

- avoiding the role of counsellor for an employee, a member of one's family, or a close friend;
- avoiding close business relationships with persons to whom one is providing intensive and/or one-to-one pastoral ministry;
- avoiding situations where a conflict of interest may arise, e.g. declining to enter into counselling, advice giving or spiritual direction relationships with more than one person from the same family.

6.4 Religious and clergy shall terminate a pastoral relationship when it is reasonably clear that the person seeking support is not benefiting from the relationship. In so doing the cleric or religious shall offer to help to locate an alternative source of assistance.

- 26 -

Commitment to this standard would be indicated by:

- developing and maintaining a referral network. Diocesan directories of pastoral counsellors and spiritual directors would be helpful;
- being clear about the limits of pastoral relationships when they commence;
- negotiating a plan of action for intensive pastoral relationships when they

commence.

With regard to this standard, the following behaviours are mandatory for all clergy, religious and church lay workers:

- ending pastoral relationships where one senses oneself:
 - continually feeling frustrated or angry in the relationship,
 - sexually attracted to the person one is supporting, or
 - projecting one's own feelings and issues onto the other person or persons in the pastoral relationship;
- pastoral relationships shall be reviewed and ended where appropriate when the person one is supporting:
 - acts in a sexual manner,
 - is continually angry or frustrated in the context of the support relationship, or

- 27 -

- shows no movement towards resolution of issues at hand.

6.5 As an aid to pastoral competence, clergy, religious and church lay workers shall maintain appropriate records of pastoral activities.

Commitment to this standard would be indicated by:

- recording of the date and time of

appointments in a desk diary;

- maintaining a journal or log book for the recording of critical pastoral incidents;
- making notes on all counselling and assessment sessions, recording the dates, times, places, the matter discussed, a plan of action, any up-date material, and any circumstances that one feels should be recorded;
- keeping a record of all referrals one makes, noting the name, date, to whom the referral was made and the reason for the referral;
- retaining all records, including used desk diaries and journals for at least ten years;
- taking appropriate measures to ensure the confidentiality of all records.

- 28 -

6.6 Where applicable, clergy, religious and church lay workers shall maintain membership of professional associations.

While engaged in the ministry of pastoral counselling or Spiritual direction, they need to find some form of supervision for themselves.

7. *Stewardship*

Clergy, religious and church lay workers should administer the temporal good of Christian communities in the interests of proclaiming the Reign of God. The Judaeo-Christian tradition calls all to the practice of justice and charity in the administration of temporal goods and the fruit of human labour. Clergy, religious and church lay workers who have responsibility for the administration of the property and finances of the Christian community should act with justice and integrity and always be conscious that they are stewards, not owners of such property and funds.

7.1 Religious and clergy shall observe the rules of office relating to administration of property and finances, as set out in Canon Law and/or in their constitution and statutes.

Commitment to this standard would be indicated by:

- developing ethical standards and attitudes of responsibility and accountability in financial stewardship, care for the environment and use of the goods of the earth.

7.2 Clergy, religious and church lay workers who take part in the administration of property or finances shall plan for and monitor this administration.

- 30 -

Commitment to this standard would be indicated by:

- drawing up a budget of income and expenditure each year;²⁸
- acquiring the necessary expertise to handle finances;
- keeping accurate records of income and expenditure;²⁹
- drawing up an account of one's administration at regular intervals, determined according to the size of the

²⁸ Cf. *Code of Canon Law*, c.1284, e3

²⁹ *Ibid*, c.1284, e2,7.

budget, but at least once a year;³⁰

- having all accounts containing substantial sums of money independently audited each year.

7.3 Clergy, religious and church lay workers shall not use their position to seek or obtain any financial or other personal advantage.

Commitment to this standard would be indicated by:

- exercising prudence in the giving of gifts or benefits;
- recording, by the issuing of receipts, the acceptance of all financial gifts or benefits for and on behalf of the ministry in which one is engaged;

³⁰ Cf. *Ibid*, c.1284, e2,8.

- never soliciting gifts, rewards or benefits for oneself;
- refusing gifts, rewards or benefits which might compromise the integrity of one's ministry;
- never borrowing money from pastoral accounts for personal use.

- 32 -

8. *Self Care*

Clergy, religious and church lay workers should be committed to developing and

maintaining their whole being as expressed in their spiritual, physical and emotional health that they might have the stamina to proclaim the Reign of God.

The human person shares in the dignity of “the image of God”; he/she is the temple of the Spirit.³¹ For this reason, human beings should not neglect their physical lives. Rather, they are obliged to care for themselves and regard life and physical and emotional health as precious gifts entrusted to them by God.³² Religious and clergy should respect this gift and care for their spiritual, physical and emotional well-being. In so doing, they should also have regard to the needs of others and the common good.

8.1 Clergy, religious and church lay workers shall strive to maintain their spiritual health.

Commitment to this standard would be indicated by:

- regularly seeking nourishment in Scripture and the Eucharist, and recourse to the Sacrament of Reconciliation;³³

³¹ Cf. 1 Cor.6:19-20; 15:44-45

³² *Gaudium et Spes*, art 14.1; *Catechism of the Catholic Church*, art 2288

³³ *Code of Canon Law*, c.276: 2n; 663:2

- following a regular discipline of reflective reading, prayer, spiritual direction and other spiritual practices;
- making an annual retreat,³⁴
- participation in on-going formation such as sabbaticals and renewal courses.

8.2 Religious and clergy shall monitor their lifestyle to ensure they maintain their physical and emotional health.

Commitment to this standard would be indicated by:

- periodically discussing one's physical and emotional health with a pastoral support person or group;
- having one's medical and dental health annually checked by a medical doctor and dentist;
- seeking support of a trusted colleague when in difficulty in one's pastoral, personal or community life.

8.3 Clergy, religious and church lay workers shall take positive steps to develop and maintain their physical and emotional health.

³⁴

Ibid, c.276:2n.4; 663:5

Commitment to this standard would be indicated by:

- getting proper nutrition, regular exercise and adequate sleep;
- taking days off, and annual holidays;
- using alcohol and other drugs appropriately;
- nurturing friendships apart from one's pastoral relationships;
- seeking professional help when required.

- 35 -

APPENDIX 1

Procedures for Responding to Misconduct

To achieve the desired outcomes (see Preamble), this Document of Ethical Standards must be supported by clear and effective procedures for dealing with misconduct. At this early stage of the development of Integrity in Ministry, it is essential that clergy, religious and church lay workers and those they serve give careful consideration to these procedures. It is hoped each ecclesiastical province in the SACBC region will hold workshops on the document and that the Professional Conduct Committee in each province will find suitable ways to inculturate the document in their area and make clear an appropriate means for the reception, processing and adjudication of alleged breaches of the Document of Ethical Standards. Consideration must also be given to the even more difficult and disconcerting issues of sanctions. The following sections are offered as a guide to reflection on this question of responding to misconduct.

N.B. *If the alleged misconduct relates to matters covered by The Child Abuse Protocol of the SACBC, there are already procedures in place, including appropriate referral to police services in criminal matters. The following sections relate to allegations of misconduct not covered by The Child Abuse Protocol of the SACBC but specific to the Document of Ethical Standards.*

- 36 -

1. Investigations of Alleged Misconduct

Individual Bishops might ask the Ecclesiastical Provincial Professional Conduct Committee to establish clear and just procedures for receiving

and investigating allegations of misconduct. As a minimum, these procedures will need to state:

- to whom an allegation of misconduct should be reported;
- who is to be responsible for investigating the allegation;
- how and to whom the investigator is to report;
- measures to ensure procedural fairness and respect for natural justice in the conduct of investigations.

2. Determination of Misconduct

Where there is *prima facie* evidence of misconduct, processes and procedures must be in place for the expeditious and fair determination of the allegation. This is essential to ensure justice for both the person alleging misconduct and the cleric or religious against whom the allegation is made.

3. Sanctions

For this Document of Ethical Standards to have credibility, it is essential that it contain sanctions that can be imposed when misconduct, especially

- 37 -

serious misconduct occurs. Procedures for the imposition of sanctions will need to be developed, as will clear principles to ensure they are consistently and fairly applied.

Responses to the consultation questions will provide the basis for developing this section.

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