

Report on Safe Congregations: UUA Office for Ethics in Congregational Life 2002-2007
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The Office of Ethics in Congregational Life was created after - and grew out of - the work of The Safe Congregations Panel and The Ad Hoc Task Force on Ethics in Congregational Life. This report summarizes UUA efforts for congregational safety from 2002-2007.

- Restorative Justice Report - The Safe Congregations Staff Team appointed The Safe Congregations Panel (1998-2000) to recommend a UUA response and ministry to victims/survivors of clergy sexual misconduct. The Staff Team and Kay Montgomery met with the committee at the General Assembly (2000) following completion of their report. In December of 2002 the Task Force gathered in Baltimore to review their report and recommendations with me as we were in the process of shaping what is currently known as Ethics in Congregational Life. An update report on the recommendations with information on action take was presented to the UUA Board in April 2004. The Panel's report (Restorative Justice for All) and the 2004 update are available on uua.org.
- Massachusetts Mandatory Reporting Law - This law, passed by the Massachusetts legislature in May 2002, included a review and reporting requirement. The UUA undertook a review of its records, including a review of all past cases of clergy sexual abuse/misconduct. We filed the required reports with the Commonwealth of Massachusetts by the deadline of August 2002.
- Revised process for handling complaints - In May of 2000 an Ad Hoc Task Force on Ethics and Congregational Life was convened by UUA Executive Vice President Kay Montgomery to recommend clarifying positive changes in the UUA process for responding to complaints of ministerial misconduct. In March of 2001 the Task Force concluded its work, presenting recommendations for improvements. In July 2002, as a part of the restructuring of UUA staff, those recommendations were used to guide changes in the process for handling complaints of professional misconduct. At that time, the responsibility for receipt of complaints about professional misconduct shifted from the Director of the Department of Ministry (now Ministry and Professional Leadership Staff Group) to the Director for Congregational Services. Also at that time a process for Liaison Support was developed to provide support to victim/complainants when a complaint of professional misconduct is received. Liaison support has been used in two situations. In the spring of 2007 we began a review of the complaint process. One change already agreed to is that liaison support will available earlier in the process.
- Safety and Ethics web site created on uua.org - This site offers basic information and resources including a description of the process for handling complaints of professional misconduct, sample policies, sample limited access agreements, links to resources such as Balancing Acts and Responsible Staffing. The site is maintained by the Director and Administrator for Congregational Services.

- Resources - Three significant resources have been developed during this time: Balancing Acts (basic safe congregation resources including guidance on deciding whether and if so how to include a sex offender in the congregation), Responsible Staffing (guidelines for responsible hiring including information on background checks), and the second edition of the Creating Safe Congregations workbook (essays and workshops for congregational leaders on various aspects of safety).
- Stakeholder Consultation - Held in September 2004, the consultation focused on (1) current needs and issues in congregational safety (2) resources for dealing with the current range of issues (3) what now and what next? how can we be most useful and "successful" in helping our congregations and leaders now and in the future? Information and recommendations from the consultation were provided to the UUA's Safe Congregations Team to guide our work with congregational leaders.
- On line Safe Congregations Training - The UUA, in partnership with the Liberal Religious Educators Association, the New England Adolescent Research Institute and the Connecticut Distanced Learning Center is launching an online training based on Balancing Acts. The purpose of the on line training is to provide basic grounding in safe congregations issues and resources to congregational leaders, both lay and professional, including policies and procedures, guidance on educating the congregation, development of a safe congregation team, and a process for considering whether and if so how a congregation may include a person who is a sex offender. The test of the training took place in April 2007. The public launch will take place by July 2007. As far as we know this the first time the web is being used as the delivery vehicle for this kind of training. On site trainings offered have included Creating Safe Congregations led by Marge Corletti and Fred Muir and A Time to Build: Creating Sexually Healthy Congregations led by Debra Haffner.
- Risk Management resources - Working with Church Mutual, we provide resources to District Staff and to each congregation. We also recommend use of Church Mutual's risk management web site.
- The Safe Congregations Staff Team - This team meets as needed to address issues of misconduct and other congregational safety concerns. Currently the Team includes Kay Montgomery (UUA Executive Vice President), Beth Miller (Director for Ministry and Professional Leadership) and Tracey Robinson-Harris (Director for Congregational Services). Other staff members are included as necessary.
- Consultation - I have consulted with some 100 congregations over this five year period. Most consultations have been by phone. Among the issues and concerns addressed are inclusion of a sex offender in the congregation, questions about mandatory reporting and background checks, inappropriate behavior by a member, boundary violations/inappropriate behavior by a religious professional. Of these consultations, 9 resulted in complaints being forwarded to the MFC addressing a variety of (alleged) boundary violations.