

# Leadership Training Handbook



American Ethical Union Leadership Committee

2016

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**Introduction** This handbook provides information and guidance on Ethical Culture Leadership training – the requirements and application process. In addition, information for Officiants and Chaplains is included. The contents of this handbook are subject to revision. We invite you to contact the Dean of Leadership Training with any questions or concerns.

## **About Ethical Culture Leadership**

Ethical Culture Leaders are the clergy of the Ethical Culture Movement. They serve Ethical societies and the Ethical Movement, fulfilling roles that cover both pastoral and inspirational aspects of Leadership congregational and denominational life. Leaders are trained under the auspices of the American Ethical Union Committee and certified (rather than ordained) by the AEU Board based on the recommendation of the Leadership Committee. Certified Leaders work in partnership with lay members for the benefit of individual societies and the Ethical Culture Movement. Currently, most Leaders are employed by Ethical societies on a part-time basis and Leaders are urged to have additional sources of income.

## **About the AEU Leadership Committee**

The Leadership Committee is a standing committee of the American Ethical Union. Its role includes overseeing the training of the professional Leadership and making recommendations for certification to the AEU Board upon completion of training. In addition, the Committee oversees the training of Ethical Culture/Ethical Humanist Officiants and makes recommendations to the AEU Board for licensing of qualified candidates who have completed the required training. The Committee consults with societies intending to hire Leaders.

A person who is not a certified Ethical Culture Leader who is considering applying for the position of Leader of an Ethical Society, must have a representative of the Society consult with the chair of the Leadership Committee (as per the AEU By-laws) prior to taking any action towards hiring.

The Leadership Committee is also responsible for accepting and training lay members of societies who are seeking commissioning as Ethical Culture/Ethical Humanist Chaplains for Health Care.

The Leadership Committee is typically comprised of five lay members and five certified Leaders, and chaired by one of the lay members. The subset of the certified Leaders constitutes the Leadership Training Committee and is the supervising body for Ethical Culture Leadership Training. The committees meet on a regular basis to consider issues of training for Leaders, Chaplains and Officiants.

The Dean of Leadership Training is a certified Leader who is the staff person to the Leadership Committee. The Dean coordinates the training program, providing information and guidance to both trainees and the committee.

## **Leadership Committee Members**

As of June 2016

Carol Bartell, Chair – St. Louis  
Liz Mulhal Collier - Bergen  
Joanna London - Washington (DC)  
Lenny Meyerson - Westchester  
Kate Lovelady – Chair, Training Committee – St. Louis  
Randy Best – NoVES, Triangle (NC)  
Joy McConnell – Asheville  
Bob Berson – Northern Westchester

Staff – Susan Rose, Dean

Ex-officio – Jan Broughton, President, AEU

### **Contact Information**

Carol Bartell – [cwbartell@gmail.com](mailto:cwbartell@gmail.com)  
Kate Lovelady – [klovelady@ethicalstl.org](mailto:klovelady@ethicalstl.org)  
Susan Rose – [susanrose@aeu.org](mailto:susanrose@aeu.org)

# **Leadership Training**

## **Overview**

The purpose of Ethical Culture Leadership Training is to ensure that Ethical Culture Leaders are individuals of good character who are well-equipped to serve Ethical Culture societies and the Ethical Movement. Training is given in a variety of areas during the academic module stage; an internship stage and/or field education provides an opportunity for trainees to apply what they have learned in practical situations.

Trainees come to Ethical Culture Leadership Training with varying educational backgrounds and life experiences; therefore, individualized training plans are developed for each trainee. The requirements to be considered for training include the following:

- An understanding of Ethical Culture/Ethical Humanism,
- References from three individuals who know him or her well and can assess or affirm the applicant's leadership potential.
- An undergraduate degree or the equivalent is recommended.

The expectation is that a trainee will take two years to complete the module requirements and then have an internship period at an Ethical Society (or perhaps more than one). The internship period may be completed on a full-time basis in the course of one year, although it is often done on a half-time basis over the course of two years.

Currently, training is provided primarily by certified Ethical Culture Leaders on a volunteer basis. Some lay members also provide training. Outside resources such as The Humanist Institute, college course work, and Clinical Pastoral Education (CPE) are recommended on an individual basis.

## **Application Process**

It is important that anyone applying for Ethical Culture Leadership Training have basic knowledge and understanding of Ethical Culture and an appreciation of Ethical Humanism. Minimally, applicants must have read *The Humanist Way*, by Ethical Culture Leader Ed Ericson. Experience of one or more Ethical Societies is preferable.

An individual interested in exploring Leadership Training is encouraged to speak to the Leader of his or her Society and others in the Ethical Movement. It is not required that an individual be a member of an Ethical Society to enter training; however, it is necessary for an individual to have a basic understanding of Ethical Culture prior to entering training.

A conversation with the Dean is required to provide information about the training program and to give the Leadership Committee a sense of the individual's interest in training. The Dean provides an application and the dates when the application may be considered. A \$75.00 application fee is required at the time the application is submitted to the Dean. The application is submitted to the Dean who shares the material with the full Leadership Committee. The Committee reviews the application and arranges for a personal interview with a member of the Training Committee. Qualified applicants are then invited for an interview with the Leadership Committee. Within three months, a background check is required for applicants who have been interviewed by the Committee and provisionally accepted for training. Applications are confidential.

Applications are due either by January 1 or July 1 of each year.

## **Finances**

There are a variety of expenses for Leadership Training. These include the cost of course work, the clergy assessment process, attendance at meetings of the National Leaders Council (NLC) and American Ethical Union Assemblies. Some expenses are paid for by the AEU and others by the trainee. Financial assistance may be available upon request.

### **Expenses paid for by AEU**

- Background check up to \$75.00
- Room and board at NLC meetings (there are 3 per year)
- Registration fees for AEU Annual Assembly

Note – If a Leader-in-Training is employed by a Society which requires him or her to attend the Assembly and ordinarily pays for the expenses of its Leader to attend the Assembly, the Society will pay the necessary expenses for travel and attendance at the NLC.

### **Expenses paid for by Trainee**

- University course work
- Humanist Institute – if part of training (It is not required for all trainees.)
- Clergy Assessment
- Travel to NLC meetings and AEU Assemblies

## **Requirements for Leadership Training**

### **Clergy Assessment**

All trainees are required to participate in a clergy assessment process which provides resources to help shape the direction of their training and career. The assessment is conducted by a center approved by the Leadership Committee. The assessment must be completed within six months of being accepted for training. A copy of the report will be made available to the Chairs of the Leadership and Leadership Training Committees, the Dean, and the trainee's mentor.

### **Individualized Training Program**

Upon acceptance into the Ethical Culture Leadership Training Program, a trainee is assigned a mentor. The mentor is an Ethical Culture Leader who is the primary person overseeing the training for a specific trainee. The mentor, dean and chair of the training committee work together to create an individualized program based on the education and life experiences of each trainee. Trainees will be in regular contact with their mentors. The Leadership Training Committee works to create a good fit between mentor and trainee. Although unlikely, the Leadership Committee reserves the right to terminate a trainee at any point in training.

## **Modules**

The modules are the basis for the first stage of training. They cover the basic knowledge areas for an Ethical Culture Leader. There are 8 Foundational Modules and 7 Practical Modules. The current modules are:

### **I. FOUNDATIONS**

#### **A) Ethical Culture Philosophy, History and Organization**

1. Adler's Thoughts – Foundations and His World
2. From Ethical Idealism to Ethical Humanism – Humanism and Current Thought
3. Practices and Policies

#### **B) General Knowledge**

4. Ethics
5. History of Ideas
6. World and American Religious Institutions
7. Global Humanities and Aesthetics
8. Cultural Diversity
9. Understanding Human Behavior
10. Science

### **II. PRACTICE**

11. Congregational Organization and Development
12. Lifespan Education
13. Communication Skills
14. Theory and Practice of Ethical Action
15. Practical Aesthetics – Platforms, Ceremonies, Festivals, etc.
16. Technology
17. Pastoral Counseling
18. On Being Clergy

#### **Module Advisors/Instructors:**

Module advisors are the individuals responsible for making sure that trainees meet the requirements of the specific modules. Plans for completing modules are shared with both the mentor and the Dean.

## **Internship**

After the modules are substantially completed, trainees move into the internship stage of training. The internship stage provides the trainee the opportunity to work in the context of Society life under the supervision of a professional Leader. Some areas of focus are character development, platform address preparation and delivery, congregational leadership skills, pastoral counseling, ceremonial functions, teaching, and clergy life-style. A customized program will be developed and outlined in writing.

An internship consists of a period of one full-time year or equivalent. Most typically, the internship is completed in two years with the trainee working on a half-time basis. Trainees receive a stipend for their work as a Leader Intern. The cost of the stipend is shared by the American Ethical Union and the Society at which the trainee is working. The Leadership Committee designates an Internship Supervisor, typically, the Leader of the assigned Society.

The Dean is responsible for arranging an internship in partnership with the Training Committee Chair. While it is expected that the internship will be beneficial to the participating Society, the primary purpose of an internship is for the trainee to meet specific learning goals.

## **Other Requirements**

### **Reflections and Reporting**

Ethical Culture Leadership Training is an intense process. To assist in going through this process, trainees are asked to write reflection pieces at least bi-monthly which are shared with their mentor and the Dean. In addition, trainees and mentors are required to submit bi-monthly reports to the Dean about progress on modules and any other issues which arise.

### **Meetings**

Trainees are required to appear before the full Leadership Committee once each year of their training. At such time, they will present a short Platform address and be interviewed by the committee regarding their training.

The Leadership Training Committee may meet with trainees more frequently.

Trainees are required to attend National Leaders' Council meetings which are held three times each year.

Trainees are also required to attend the Annual Assembly of the American Ethical Union.

### **Background Check**

As noted above, all applicants are required to submit a background check from an AEU approved agency within three months of acceptance into training.

### **Certification**

Upon completion of the module and internship stages of leadership training, the trainee is interviewed by the Leadership Committee. If the committee decides that a trainee has satisfactorily completed training, the committee recommends to the AEU Board that the trainee be certified, which then votes on that recommendation. The date of an affirmative AEU Board vote is the effective date of certification for that Leader.

If the Leadership Committee decides that a trainee has not satisfactorily completed training in the expected time, recommendations will be made to assess what additional work may be needed, or whether it is more appropriate to terminate training.

### **Certification Ceremony**

The certification of new Leaders is recognized with a ceremony at the first AEU Assembly following certification. The ceremony is part of the Platform and the new Leaders speak to the congregation of the Assembly, receive certificates and are welcomed into professional leadership by their Leader colleagues and the Movement.

### **Societies Hiring Leaders**

The AEU Bylaws require that any Society wishing to appoint a new Leader must consult with the Leadership Committee before negotiating with any individual directly. The full wording is from Article I. Section 6 § d) Leadership. No member organization shall appoint any person to perform the functions or use the title of Leader or Associate Leader unless such person has been so approved by the Board and placed on the roster by the Leadership Committee, as provided in Article V. Section 4. d). Any member organization wishing to appoint a new Leader or Associate Leader or to change Leaders shall consult with the Leadership Committee before negotiating with any individual or member organization directly. No member organization shall appoint any person to a position of Leadership training without the approval of the Leadership Committee.

The Leadership Committee strongly recommends that Ethical Societies give first priority to hiring individuals who are already certified as Ethical Culture Leaders or who are in the process of being trained.

The Leadership Committee also recommends that when conducting a Leader Search, that Ethical Societies include language that if an individual is not already a certified Ethical Culture Leader or already accepted into the Ethical Culture Leadership Training Program, that before hiring someone they must be accepted into the Ethical Culture Leadership Training Program and willing to fulfill all the requirements of the program to be certified.

## **Chaplaincy**

Chaplains help people connect to what is most important to them in their lives, offering the possibility to focus on their spiritual and/or religious values. Most often, people who seek the expertise of chaplains are in difficult situations and/or situations of transition.

The settings most common for chaplains are in hospitals and other health care institutions, college campuses, prisons and in military institutions. Ethical Culture sees the need to have people with a humanist perspective be available for those seeking pastoral counseling or pastoral care.

Currently, Ethical Culture has chaplains serving in hospital and in health care settings and on college campuses.

## **Health Care Chaplaincy**

The policies, training, and standards vary for chaplaincy in different venues. One area of chaplaincy that has well-established criteria for chaplains is health care. There are various organizations including the Association for Clinical Pastoral Education which have intensive training and certification programs.

Using the terminology of the Association of Professional Chaplains which offers Board Certification for Health Care, professional clergy, i.e. Ethical Culture Leaders, are *endorsed* by the AEU and lay members are *commissioned* by the AEU.

The training for health care chaplaincy commissioning consists of two parts - a grounding in Ethical Culture and other basics, and training in chaplaincy. The Foundations of Ethical Culture training is done under the auspices of the Leadership Committee and chaplaincy training is most typically done by the Association for Clinical Pastoral Education. The Clinical Pastoral Education (CPE) program has a focus on training chaplains to support people of differing religious beliefs as well as those who profess no religious beliefs.

## **Ethical Culture Chaplain Commissioning Requirements**

The process to be granted a commission as an Ethical Culture Chaplain by the American Ethical Union has several steps and requirements.

## **Application Process**

To apply for training as an Ethical Culture/Ethical Humanist Chaplain for Health Care an applicant must

1. be a member of an Ethical Culture Society,
2. speak with Dean of Leadership Training and request application, and
3. submit application to Dean for review by the Leadership Committee.
4. Upon favorable review the candidate will meet with members of the Leadership Committee.
5. All applicants are required to submit a background check from an AEU approved agency within three months of acceptance into training.
6. Upon acceptance into the Ethical Culture Chaplain for Health Care Commissioning Program, a trainee is assigned a mentor. The mentor is an Ethical Culture Leader who is the primary person overseeing the training for a specific trainee.

## **Training Requirements**

The mentor, Dean and chair of the Training Committee work together to create an individualized program based on the education and life experiences of each trainee. Trainees will be in regular contact with their mentors.

The Ethical Culture academic modules are taught by certified Ethical Culture Leaders. These modules are required:

### **A) Ethical Culture Philosophy, History and Organization**

1. Adler's Thoughts – Foundations and His World
2. From Ethical Idealism to Ethical Humanism – Humanism and Current Thought
3. Ethical Culture Structure, Practices, and Policies
4. Ethics

### **B) General Knowledge**

5. History of Ideas
6. World and American Religious Institutions
7. Cultural Diversity

**Pastoral Counseling** – this requirement will include completion of the Clinical Pastoral Education (CPE) units required by the Association of Professional Chaplains. CPE training will be at the trainee's expense. Other training expenses will be reviewed on an individual basis.

Upon completion of these requirements the trainee will meet with the full Leadership Committee. If the recommendation from the Leadership Committee of the AEU is positive, the recommendation is then presented to the Board of Directors of AEU for action.

### **Term**

When an Ethical Culture Chaplain for Health Care is first commissioned, the term is for one year. Subsequent terms are for a period of three years.

### **Renewal**

It is the responsibility of the Chaplain to apply for renewal of their Commission before the Officiant term has expired.

## **Ethical Culture/Ethical Humanist Officiants**

The position of Ethical Culture Officiant or Ethical Humanist Officiant is one of an Ethical Culture lay member performing specific ceremonial services for her/his Society and thereby for the Ethical Culture Movement, to supplement such services as are provided by professional Ethical Culture Leaders.

Each Society within its own geographical context and, in consultation with professional Leaders, determines the need for the services of an Officiant. Licensing as an Officiant confers the authority only to officiate at ceremonies.

### **Certification and Licensing**

The American Ethical Union (AEU) as an institution is responsible for the certification and licensing of all Officiants. The Board of the AEU licenses all Ethical Culture Officiants and Ethical Humanist Officiants for a specific term. All Officiants are subject to applicable local, state, and federal laws.

### **Application Process**

1. The initial request for an individual to become an Officiant for a particular Society must be made by the Board of that Society in writing, addressed to the office of the American Ethical Union.
2. After Society Board approval, the Officiant candidate sends her/his application to the AEU.
3. The Leadership Committee of the AEU reviews the qualifications and subsequently interviews the Officiant candidate before making a recommendation regarding training. The Leadership Committee must review and approve the application before an applicant is trained.
4. The Officiant candidate receives practical and theoretical training in Ethical Culture ceremonies from a certified Leader or licensed Officiant as assigned or approved by the Leadership Training Committee of the AEU.
5. If training is successfully completed the Leadership Committee makes a recommendation to the Board of Directors of the AEU for action. The recommendation may be contingent on receipt of evidence that the Officiant has been trained as defined above.

### **Training And Supervision**

Both training and direct supervision of an Officiant is the responsibility of the professional leadership of the Ethical Culture Movement. For an Officiant in a Society with a professional Leader, the supervision and training is normally the responsibility of the Leader of that Society.

In the case of an Officiant who is a member of a Society that does not have a professional Leader, the Leadership Committee arranges for training and assigns a supervisor and mentor who is a professional certified Ethical Culture Leader in the movement.

### **Compensation**

The Officiant position is that of a volunteer member, and as such cannot be a position which generates any income for the individual. Each Society sets the guidelines for contributions to the Society for the services rendered by an Officiant and for reimbursement for out-of-pocket expenses (i.e. transportation costs). Where an Officiant is serving an area that is organizing and has not yet formed a Society, these policies will be set in consultation with her or his supervisor.

**Titles**

The only titles which may be used for this position are Ethical Culture Officiant and Ethical Humanist Officiant. The Officiant is also permitted to use the title “Leader” or “Ethical Culture Leader” ONLY in signing marriage licenses in states which so require.

**Term**

When an Officiant is first licensed, the term is for one year. Subsequent terms are for a period of three years.

**Renewal**

It is the responsibility of the Officiant and the individual Society to apply for re-licensing before the Officiant term has expired. The Society Board and any Leader in the Society must approve the request. The Leadership Committee of the AEU will make recommendations to the AEU Board regarding re-licensing applications.