Policies and Procedures

The Crisis Team of the Congregational, Assessment, Response, and Transformation Team

(C.A.R.T)

CART CRISIS TEAM

Crisis Team of Congregational, Assessment, Response, and Transformation (C.A.R.T)

Introduction and Mission

The Center for Leadership Development (CLD) is a resource for District Superintendents, clergy and congregations of the North Texas Conference in the midst of crisis or conflict. Congregational Assessment, Response, and Transformation (CART) Teams are equipped to assist District Superintendents, clergy, and congregations move through the difficult work of grief, anger, mistrust, loss, and change.
The CLD has the responsibility to provide trained and skilled teams of clergy and laity to engage congregations in crisis or in conflict. The work of the CART Team is embraced to begin the work of healing and transformation within congregations in the conference.
The Crisis Team has been organized by the conference to assist the congregation in its role of ensuring healthy relationships in the North Texas Conference. Its members are gifted in assessing and responding to crisis situations in congregations that may occur, including but not limited to: loss of life or property due to an accident or natural disaster, alleged dishonesty or illegal activities, and sexual misconduct by church leadership.

The Purpose of the Crisis Team

- To provide a crisis team to carry out a crisis intervention plan for a congregation where a crisis has happened. Trained laity and clergy are available to District Superintendents (DS) and the office of the Bishop represented by the Center for Leadership Development (CLD) Director to help facilitate healing to all involved- aggrieved, alleged perpetrator, and the congregation. Matters are addressed with as much factual information as possible and appropriate to facilitate healing (otherwise healing is extremely complicated and lengthened).
- To provide informational and educational resources to the laity and clergy of the conference.
- To provide Resource Persons (lay persons with special training) to the aggrieved and other affected persons to aid them in understanding Conference policies and procedures, and if needed, to guide the aggrieved through the process of reporting misconduct.

****The CART Crisis Team does not perform any investigative function, nor does it offer disciplinary, judicial, or legal counsel, but rather its primary goal is truth telling and healing. Neither does the CART Crisis Team substitute for any professional counseling that may be needed.*

North Texas Annual Conference

PROCEDURES for CRISIS RESPONSE TEAMS

The purpose of this document is to present clearly stated procedures for the Congregational Assessment Response and Transformation Crisis Team (CART Crisis Team) that enable congregations to begin the process of healing after experiencing the trauma of a crisis event or misconduct by clergy, staff, or other leaders. Response Teams will generally follow this outline of procedures.

Procedure for reporting:

1. Before the Crisis team can be deployed, a crisis incident must be reported by the church to the District Superintendent (DS) and/or the Center for Leadership Director (CLD Director).

2. If the information brought to light involved physical, sexual, or emotional abuse of a minor (0-17 years) the receiver of the information must immediately: a. Report to the local police or Texas Child Abuse Hotline (800) 252-5400 (both if the reported offender lives with or has access to the minor or the minor is in danger) b. Report the information to the District Superintendent.

3. If the information about misconduct involved an adult the receiver of the information must immediately: a. Ask the adult if they would like help reporting to the police (if crime involved) and help them follow through. b. Report the incident information to the District Superintendent.

Deployment of Crisis Response Teams

Crisis Response Teams are deployed for congregational crises, not individual crises. Though information may be discovered during Crisis Team responses, they are not investigatory units; they are to remain neutral without aligning themselves with accused persons, victims, the DS, or the Conference/Bishop. The healing power of a Response team comes from ability to maintain integrity through the entire process- by walking together with churches during times of crisis, providing an outlet for expression of pain and grief, providing education and resources, and making professional referrals- but never crossing the lines into psychotherapy. Response Teams are accountable to the Center for Leadership Development (CLD) Director representing the Bishop and the Cabinet of the North Texas Annual Conference for the quality of their work.

- The CLD Director and/or DS will request that the Crisis Team Coordinator convene a Response Team and name a Team Leader. The Conference Coordinator will serve as the Team Leader unless circumstances require assignment of a different leader (need for Coordinator recusal or other circumstances).
- The CLD Director or DS will brief the Crisis Coordinator and/or the Response Team Leader about the situation in the local church.
- The Crisis Team Leader will make a Crisis Intake Assessment based on information gathered to that point and may interview other parties as appropriate and as time allows.

Meeting with Pastor/Staff Parish Relations Committee (SPRC)

If the CLD Director, in consultation with the Bishop/DS determines that a Response Team should be deployed to a local church, the DS will convene the SPRC to introduce the Team Leader and share the purpose of the Response Team and the scope of the Team's work. (This may be done within the context of a meeting that the superintendent had already scheduled with the SPRC.)

The purposes of this meeting with the SPRC include:

- To state the nature of the crisis, or allegations made against the clergy person, staff person, or church leader, and to share as much information as possible without violating the law, The Book of Discipline of the United Methodist Church (BOD), and any guidelines given by the Conference Chancellor
- To outline the process dictated by BOD and Conference policies
- To introduce the Crisis Team Coordinator/Team Leader of the Response Team
- To present the Conference's Response Team policy and review the services outlined in the procedures document
- To express neutrality and dedication to help the church withstand the painful process it must go through
- To delegate responsibility for the preparation and mailing of the congregational letter
- To explain that those against whom complaints are brought are innocent until proven guilty (unless there has been a confession)
- To allow the Response Team Leader to explain some of the dynamics of grief and loss and to share some ideas about what the church can expect
- To provide a summary of actions already completed and share any future actions to be taken
- To make a crisis intervention plan

Meeting with Church Staff

In large membership churches and in churches with other clergy or lay professional staff, the CLD Director and/or DS, accompanied by the Response Team Leader, should meet as soon as possible with the staff members of the church:

- To state the nature of the crisis, summary of or allegations made against the clergy person/staff person/church leader, summary of actions taken and to be taken, and to share as much information as possible taking care not to violate the law, BOD process, and any guidelines given by the Conference Chancellor

- To outline the process dictated by BOD and conferences policies and procedures
- To introduce the Team Leader of the Response Team
- Discuss the needs of the staff and congregation and further develop Crisis Intervention Plan
- To provide pastoral care to the staff- including processing of feelings, expression of neutrality to help all parties, education in grief and loss, and processing some possible challenges they will face as staff
- To enable the staff to provide supportive leadership for the work of the Response Team

Meet with Church Council/Leadership Team

As soon as possible following the meeting with the SPRC and the meeting with the staff, the CLD Director and/or DS accompanied by the Response Team Leader should meet with the Church Administrative Council/Leadership Team. In small churches and under some circumstances, the Leadership and SPRC teams may meet together at the same time. Members of the employed staff and any appointed clergy persons (not including the any persons against whom a complaint is made) should be invited to attend.

The purpose of the meeting is much the same as with the SPRC, but with the following goals:

- To share and perfect plans for a Congregational Meeting and Small Group Meetings including meals or refreshments, number of rooms needed and room set-up, childcare, and naming who is responsible for each
- To provide as much information and education as possible, and answer questions
- To express neutrality and dedication to help the church withstand the painful process it must go through
- To provide allow persons the opportunity to express grief and process anxiety

- To confirm further meetings with the CLD Director and/or DS and/or the Response Team Coordinator
- To make arrangements for child and youth care during the worship service (Sunday presence of CLD Director and DS) when the superintendent and/or the CLD Director will discuss the nature of the crisis or complaint and the resulting action
- To review the Response Team services

Letter to the Congregation

Where possible, a letter may be sent to church members preceding the first Sunday, or as soon as possible, following the administrative actions taken (ex. removal or suspension of clergy, staff, or volunteer). The letter should be sent only to the members of the local church.

The purpose of the letter is as follows:

- If there is an absence of a position from removal or death of staff, clergy, or volunteer, to explain the administrative actions such as suspension, firing, or other relevant administrative actions that have been taken

- To explain how pastoral services, care, or other roles will be continued in the absence of the church leader
- To announce when the CLD Director and/or District Superintendent and/or the Response Team will be present for Sunday worship, Congregational Meetings, and Small Group Meetings to help the congregation through the crisis
- To explain services of the Response Team
- To provide information for contacting the following people: interim pastor assigned (if removal of senior pastor), the SPRC Chairperson, the Response Team Leader, and the District Superintendent
- The Leadership should sign and distribute the letter

Sunday Worship Presence of CLD Director and/or District Superintendent

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On the first available Sunday following the meeting with the Staff/Pastor Parrish Relations Committee, the church staff and the church council/leadership team, the CLD Director and/or District Superintendent should be present in Sunday morning worship services. CLD Director and/or DS may be accompanied by the Crisis Team Leader or a member of the Response Team.

Just before the benediction, the DS and/or CLD Director should dismiss all visitors, children and youth, requesting all members to remain. The DS/ CLD Director will announce to the congregation the nature of the crisis event or the filing of a complaint against the accused and the resulting action. The DS/CLD Director will also announce the arrangements for the congregational and small group meetings.

If the congregational meeting follows the last worship service of the day, refreshments or a light meal should be provided for those attending as a time of transition and nourishment. Childcare should be provided. A separate meeting with the youth of the church can be planned in consultation with the youth director and a Response Team member.

The CLD Director's or DS's role is as follows:

- To state the nature of the crisis and or/complaint made
- To give an overview of the process dictated by The Book of Discipline and by the policy of the North Texas Annual Conference
- To begin pastoral care for the church and to lead the church in prayer
- To pray for and request prayers for all involved. (If a boundary or misconduct situation, for the complainant and his/her family- but not to name the complainant publicly, and for the accused and his/her family)
- To pray for and request prayers for the church
- To share the various means of support by the conference offered to those affected (if a boundary or misconduct situation- to the accused and his/her family and to the aggrieved and his/her family)
- To ask the congregation not to contact the accused and his/her family (if a boundary or misconduct situation) until this matter has been resolved and to respect the fact that the accused and his/her family have been instructed not to contact members of the congregation
- To announce the deployment of the Response Team and to introduce any member of the team who is present
- To announce and describe the planned Congregational Meeting and Small Group Meetings
- To announce, if possible, who will be preaching and providing pastoral care for the congregation (if senior pastor has gone) or to announce how the absence of the leadership/staff role will be filled
- To assure the congregation of the support of the district, the conference and the Bishop
- To request that the congregation be in prayer continuously in the days and weeks to come.

The Response Team

The Response Team may be available to work with the congregation immediately following the worship service. If there is no intervention planned to follow the last worship service, the Response Team will work with the Church Council/Leadership Team and SPRC to plan the Congregational and Small Group meetings.

Printed information on the Response Team and the Team's availability should be placed in the worship area/narthex on the day of announcement in worship and at least for two weeks immediately following the worship announcement. This information may also be disseminated after the Congregational and Small Group meetings.

Educational and devotional materials should also be made available at the earliest possible time.

Resource Persons (Crisis Team Laity with Resource Person Training) may be provided to persons in distress directly involved with the crisis. (* See attachment regarding Resource Persons)

Congregational Crisis Meeting

The Congregational Meeting with the CLD Director/DS should be scheduled as soon as possible following the meeting with the SPRC meeting, but no later than one week following the worship service in which the announcement of the crisis and the resulting actions were made. The time, place, and an explanation of what will take place at the meeting may be announced in worship services and in the congregational letter.

The purpose of the Congregational Meeting is:

- Truth telling- to share as much information as can be shared at that time
- Share next steps, introduce the Response Team and share what can be experienced in a local church when such a crisis occurs
- Share the ground rules for Small Group Meetings which should immediately follow the Congregational Meeting. *Note: depending on the crisis and if the congregation is small (30 members or less), it may be more helpful for them to stay together and process the crisis instead of breaking into smaller groups. However, groups larger than 30 make it very difficult to create a space that feels safe enough for speaking/sharing.*

Small Group Meetings

Small Group Meetings are an extremely important component to the process of congregational healing because they provide the time and place for closer attention to individual concerns and feelings. Congregants and staff are generally broken into Small Groups depending on their relationship to the crisis and/or role in the church. In churches with large staffs, both clergy and staff members have each found it helpful to share in their own groups. Also, if there is a Small Group that has more than 20-30 people, the Crisis Team will try to break them into 2 smaller groups for the purpose of giving appropriate attention to all participants. *Note**: If there is/are any victims of sexual misconduct, it is highly advised that neither the victim(s) or family members participate in the Small Group meetings**, as this can cause more psychological damage for them than any positive outcomes. The victim(s)/families will be offered support services through the Crisis Team and pastoral care from an appropriate pastor.*

Small groups will:

- Meet for 1 and ½ to 2 hours – allowing time to process feelings, but not so long that the group loses focus.
- Be given ground rules regarding commitment to confidentiality but not secrecy, sharing without interruption by others, and respect for where each person may be in their healing- including making only positive comments about what is shared to others who are brave enough to share
- Allow a person who experiences distress to meet with a Crisis Team Member, one on one if needed, during the Small Group Meeting time
- Be given educational information and resources as appropriate
- Be given an invitation to contact the Crisis Team Coordinator/Leader at any time with questions or needs regarding the crisis

Support for all Parties

The Response Team is charged with offering support to all parties involved. The role of the Response Team member is that of a caring listener, never a therapist. The grief process is discussed, and the procedures in the BOD and the conference policies are explained.

Continued Healing

The Response Team Leader will help members and leaders understand the dynamics of interaction during and immediately following a crisis. S/he will help members and leaders understand what to expect, and how they can be helpful in the healing process.

The following dynamics may be shared:

- Many of the emotions leaders and members of the congregation will experience are a part of the grief process. (It is important to give an overview of the stages experienced in the grief process as well as any other educational materials deemed necessary.)
- If misconduct is a factor:
  * A certain amount of conflict is inevitable when there are people with differing views about the charges and person charged
  * Some members of the congregation may have come to the church and joined because they were attracted to the person charged and may have experienced him/her in an especially positive way. Some within these groups may find it difficult to believe that the accused is capable of doing harm, even when there is compelling evidence. These persons may not only defend the accused person vigorously, but they may even attack the person bringing the charges and those who believe the charges.
  * Conversely, some congregants may have had negative experiences with the accused; others may have direct knowledge of the accused misconduct or may have been subjected to it. These individuals may be quick to believe the allegations and may be unwilling to wait for results of the investigation. They will have no difficulty believing the charges.
  * Some congregants may be "in the middle." For them the conflict is worsened to the extent that that see others drawn into one of the extreme positions. In the midst of conflict, those in the middle may elect to not attend services until the conflict is resolved or managed.

Continued Healing in Small Groups and Other Settings

Members of the Response Team and those oriented by the Team may meet with the congregation in existing small groups of the church (for example: Sunday School classes, Bible studies, age level groups, interest and service groups) in order to help them understand what to expect in the months ahead. It is recommended that one member of the Response Team have some background in working with youth and children and be capable of using age-appropriate means of communicating and helping children and youth to express their feelings.

Empowering the Congregation to Complete Its Own Healing Process

Every effort will be made to encourage the congregational leadership to assist in discerning and recommending the types of support the Crisis Team and/or trained mediators could provide in order to assist the church to regain a sense of shalom and control following the initial trauma. The goal is to move toward a timely, orderly withdrawal of the Response Team as the local church gains strength and skill in the healing process.

Self-Evaluation of Response

The Response Team will, with the Coordinator of the CART Crisis Team, discuss the case and a self-evaluation of its work within a month of completing its active service in a church, if at all possible.

Final Report to CLD Director and Bishop

The Team Leader or the Conference Coordinator of the Response Team will make a written report if needed following the Team's completion of active service in a particular church. This report will be furnished to those persons in need of the report on a case-by-case basis. The work of the Response Teams should be evaluated by the CLD, Bishop, Cabinet, and Conference Board of Ordained Ministry at least annually. It is also recommended that the Response Teams and the Cabinet share in a joint educational experience each quadrennium.

Continued Support for Affected Churches/Clergy

The Response Teams understand that their intervention into the situation alone may not be enough to guide a church out of a crisis sparked by misconduct. This may be the case for a variety of reasons including pre-existing church conflict or the lack of the congregation's experience in dealing with conflict in a Biblical manner.

In those churches where an interim pastor is appointed, it is very important that the pastor receive appropriate information. The circumstances surrounding the appointment change should be shared with the interim pastor to the extent possible.

Issues of confidentiality must be observed but disclosure of relevant information is important to good leadership by an interim pastor and next appointed pastors. Both interim pastors and next appointed pastors should receive continual support from the CLD Director and the DS and should have access to the District Office when needed.

North Texas Conference Policies and Procedures for Resource Persons

A resource person is a lay professional volunteer made available by the CART Crisis Team to support persons who have experienced a trauma or boundary violation, and who may be considering filing a formal complaint. This service is made available to any person within the scope of the North Texas Conference who asks.

A resource person may be obtained by contacting the CART Crisis Team Coordinator who will assess the case and assign a Resource Person he/she sees as the best fit possible for the case. This may be done in confidentiality unless a formal complaint is filed, and then confidentiality of the Resource Person relationship with the person receiving services is made public.

The complainant may have an issue with clergy or another church leader. The complaint may or may not involve sexual misconduct. Often a person simply needs someone to listen to their story and help them decide the most appropriate and helpful steps to take for their healing, such as a referral to a counselor/therapist. Resource Persons stay within the boundaries of a support person (providing information, education, and listening) and do not at any time cross over to become a counselor or therapist.

The Duties of a Resource Person

- Listening and processing information with a person and helping to decide next steps
- Providing education, information, resources and referrals
- Provide an intake/assessment, monthly or quarterly reports (to be decided upon by the CART Crisis Coordinator on a case by case basis), and final report/incident closure- each to CART Crisis Coordinator in a timely manor
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If an allegation is made the duties also include:

- Confirm the aggrieved person understands the procedures for reporting allegation of sexual misconduct or other types of abuse
- Verifying and clarifying the allegation with the aggrieved person
- Requesting that the aggrieved person prepare a written summary of the allegation and, if necessary, a formal complaint when requested to do so
- Helping the aggrieved person prepare the written summary and formal complaint
- Once filing a complaint has been decided, inform the Crisis Team Coordinator so that the DS and CLD Director may be informed
- Accompanying aggrieved person to meetings help in connection with the Procedures of the North Texas Conference
- Calling to the attention of the Bishop, CLD Director, and CART Coordinator and any vindictive, hostile, or insensitive situations that arise during the process
- Giving feedback to the CART Coordinator regarding observations of helpful and hurtful situations arising during the process

Crisis Intervention Counseling Policies and Procedures

There is often a gap in time between a crisis event and obtaining necessary resources for healing a trauma. The North Texas Conference of the United Methodist Church recognizes there may be occasional need for short term crisis counseling for church congregants or staff affected by a crisis within the church. Examples include but are not limited to: ministerial or laity sexual misconduct, sudden death of clergy or church leader, violent crime at a church or church related event, or fire or natural disaster involving a church. The following information provides policies and procedures to obtain short term crisis counseling while waiting on appropriate referrals for and connection with a provider for longer term counseling.

If a crisis counseling need is perceived by the Bishop, District Superintendent, the church leadership, or any person connected with the church crisis or Crisis Team:

1. A referral of the person or family in need should be made to Crisis Team Coordinator or Center for Leadership Development Director
2. Crisis Team Coordinator or CLD Director will assess the persons/families on a case by case basis
3. The Crisis Team Coordinator (or a Resource Person may be assigned) will assist the person/family with the process of obtaining counseling information and referrals through their insurance company and/or community resources- if such assistance is needed
4. If the person or family will not be seen in a time proportionate to the crisis and need, the Crisis Team Coordinator or Resource person will request short term crisis counseling services through the Director of the Center for Leadership Development
5. The Director of the Center for Leadership Development may approve up to 4 crisis counseling sessions with the Wellspring Counseling Center at First United Methodist Church of Plano, the Pastoral Counseling Center, or another appropriate crisis counseling provider
6. The crisis counseling will be terminated upon:
    - The transition to longer term counselor
    - Resolution of the crisis
    - Noncompliance by the recipient in counseling attendance
    - The extension of conference financial resources for the case have been exhausted
7. The CLD Director may extend or retract financial resources for crisis counseling upon his/her discretion and assessment

Procedures Regarding Recruitment and Training of Response Team Members

The Response Team is comprised of members who are selected because of their gifts and skills for crisis work.

Criteria

The Response Team members should possess some or all of the following qualifications:

- Masters or doctorate degree in counseling, social work, or psychology
- Licensed at the highest level for profession (LPC, LMFT, LCSW)
- Five years post graduate experience
- Experience working with youth and children

All team members will possess the following qualifications:

- Ability to work independently and as a team member
- Member of a local United Methodist Church, strong Christian faith, and abide by the policies of the NTCUMC
- Trained in trauma debriefing, crisis response, grief therapy, group dynamics, and sexual misconduct
- Maintain confidentiality of the work

(as many as 3, but as many as are needed, to include both laity and clergy to accomplish the task to respond to crisis incidents)

Selection Process

These individuals are sought from the community in which they are known for their expertise, their compassion, and their reputation within the community. Recommendations are considered from various clergy and lay members, and from clinical professionals within the community.

Prospective Crisis Team Members understand that they will operate in a volunteer capacity completing all the following: application (to include confidentiality covenant), background check, Ministry Safe training, interview by Crisis Team Coordinator, and other relevant information submitted at the time of application.

Composition of Team

The Crisis team consists of a pool of trained members who are selected by the Crisis Team Coordinator to respond to a particular incident. Team members are not asked to work on two interventions simultaneously unless there are circumstances that require them to do so.

Training and Support

Training will consist of orienting new members to the Team and process, ongoing updates in the areas of trauma and critical incident response, grief counseling, and administrative and policy updates of the NTCUMC. Training may also include debriefing from interventions to include improvement for future interventions. Training may include services from other conferences, The National Organization of Victims Assistance (NOVA), from the International Critical Incident Stress Foundation (ICISF), from general COSROW, and other appropriate professionals and resources.

Role of Team Coordinator

The CART Crisis Team Coordinator is an appointed and/or hired leader directly accountable to the Center for Leadership Development Director who represents the Bishop. The Coordinator recruits prospective Team Members and Resource Persons and provides for their training. The Coordinator assesses crisis situations, consults with the DS and church leaders, attends church meetings, and develops a plan with the church for crisis intervention. The Coordinator deploys and coordinates a team for intervention that best suits the crisis at hand. The Coordinator gathers information from team members throughout the intervention process and provides reports to the CLD Director and Bishop.

Crisis Team Financial Policies

Response Team Members, Resource Persons, and other volunteers are not compensated for their time. The exception is when extensive planning and training workshops are planned and conducted by team members who may receive an honorarium.

Due to the geographic size of the North Texas Conference and the intensity of the work, there are some expenses that can be reimbursed.

1. Proper receipts are to be collected at the time of the expense and given to the Response Team Coordinator within 30 days of the expense.

2. The Conference Office will send the reimbursement check directly to the recipient.

Examples of reimbursable expenses are:

- Mileage for response team members traveling **more** than 40 miles round trip, based on the IRS volunteer reimbursable rate.
- Overnight accommodations when traveling to a crisis response 2 hours or more away in the evening.
- Provision of a meal during the crisis intervention, especially if working through lunch or dinner and the church is unable to provide a meal.