

Healthy Boundaries

101—Fundamentals and 201—Beyond Basics

TEACHER'S GUIDE

TOPICS INCLUDE:

Theology and Nature of Boundaries

Power and Vulnerability

Dating, Friendships, Dual Relationships, Gifts

The Pulpit, Transference, Hugging and
Touching, Intimacy

Emerging Issues in Maintaining Healthy Boundaries

Living with Healthy Boundaries

Personal Needs and Self-Care

Healthy Boundaries

101—Fundamentals and 201—Beyond Basics

TEACHER'S GUIDE

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GENERAL INFORMATION—TEACHER'S GUIDE

Background

Those of us who become spiritual leaders have experienced a call to serve and nurture others. Our ministry or teaching is guided by the respect we have for our congregants/students and by their having entrusted us with their spiritual well-being. When we do not respect their separateness or use their vulnerabilities to satisfy our personal needs, we have violated boundaries and betrayed a sacred trust.

Healthy boundaries are a gift. They are helpful guidelines that give shape to our relationships. In ministry and teaching situations boundaries clarify who is the congregant and who is the mentor, not in a hierarchical way, but in a manner that prevents the unhealthy merging of individuals. Boundaries create safe spaces and help to build trust over time.

We live in a postmodern world where the idea of boundaries is, at best, confused and at worst, resisted. Some faith leaders react against the idea of boundaries in pastoral and teaching relationships. They resent any limit or requirements of policies such as mandatory training on boundaries. Rather than accept the challenge of distinguishing between appropriate and inappropriate boundary crossing, these leaders sometimes choose an easy solution: never touch a congregant or meet with someone behind closed doors. A reactionary response such as this does nothing to foster better leadership. We need to do the hard work of engaging the challenges and benefits of boundaries.¹

It is important to understand that boundary

crossing, per se, is not the problem. In fact, ministry and leadership often require that we cross boundaries. For example, we sometimes initiate contact with a congregant whom we know is struggling, or we urge a congregant or student to take on a volunteer role. Boundary *violations* are the problem, that is, taking advantage of congregants or students in ways that are not in their best interests.

Spiritual leadership is replete with boundary challenges. Often the lines between what is appropriate and what is not are unclear. In addition, most of us struggle with our ambivalence about boundaries and about the power and authority that we hold as a faith leader. Even as we may have come to some awareness about the basics of healthy boundaries, the issues before us get more complex every day. Internet technology and social media have added a whole new layer of complexity to boundary issues. Our ethical bottom line is to question whether a boundary crossing is in the best interests of the congregant and the congregation. Yet we cannot always trust our own judgment because, being human, we tend to be blinded by our needs and desires. Therefore, in matters that require decisions about where the limits are and whether we should cross the boundaries, we need a system of accountability which often relies on consultation with a spiritual director, teacher, or colleague.

In congregations/sanghas, those in set-apart positions are not the only ones to cross boundaries inappropriately. Because power is derived from education, resources, and status, lay leaders, as powerful personages, also sometimes challenge relational limits. They, too, need to learn the principles of maintaining appropriate boundaries. Sexual harassment and bullying of clergy and spiritual teachers by lay people is a

¹ In some contexts, however—in the Orthodox Jewish community, for instance—the decision to refrain from touching is not a reactionary response but rather a matter of religious obligation.

real problem. Furthermore, clergy and spiritual teachers need to recognize when others in the congregation/sangha step over the line.

Tragically we have seen the untold damage to individuals and congregations and exorbitant costs to congregations and organizations caused by clergy and spiritual teachers violating boundaries. When boundaries are violated, intervention is necessary to limit or remove a minister or spiritual teacher. But training on healthy boundaries is one means of prevention.

Healthy Boundaries 101—Fundamentals and *Healthy Boundaries 201—Beyond Basics* are intended for all clergy and spiritual teachers who are potential wanderers. This means virtually all of us because we all have the capacity to wander across necessary boundaries in ways that could be harmful. *Healthy Boundaries 101* is intended for leaders who are looking for an introduction to the nature of boundaries and the issues of power and vulnerability. *Healthy Boundaries 201* is intended as advanced training for those already familiar with the basic principles of healthy boundaries.

These courses are not intended for intervention with predatory leaders, nor will they prevent those who are predatory from harmful boundary violations. If anything, it may actually enhance their manipulative skills. This is a risk we are willing to take in order to better prepare conscientious clergy and teachers to best serve their congregants and students.

Healthy Boundaries 101—Fundamentals and *Healthy Boundaries 201—Beyond Basics* have been developed to be used by multiple faith groups. We encourage teachers presenting the materials to be creative and further adapt the materials to fit your faith group and to speak to the particular cultural values and expectations therein. We will generally refer to persons in leadership as clergy, ministers or spiritual teachers and to congregations (Christian and Jewish) or sanghas (Buddhist).

Organization of These Materials

Section One provides materials for teaching *Healthy Boundaries 101—Fundamentals* which uses the DVD series *A Sacred Trust* as the primary teaching tool. This course material and workbook is an introduction to healthy boundaries intended for clergy or spiritual leaders who have not yet been exposed to the fundamentals. See page 11 for additional information regarding *Healthy Boundaries 101* course material.

Section Two provides materials for teaching *Healthy Boundaries 201—Beyond Basics* which uses excerpts from the DVDs *A Sacred Trust* and *Once You Cross the Line* in addition to written resources. This course material and workbook is the advanced healthy boundary discussion and assumes that participants have already been exposed to an introductory discussion of healthy boundaries (either *Healthy Boundaries 101* or some other program). See page 35 for additional information regarding *Healthy Boundaries 201* course material.

Section Three, beginning on page 71, includes texts and prayers from Jewish, Christian, and Buddhist perspectives which can be used for meditation and reflection. We include this material organized by themes so you can integrate it as appropriate to your planning. It is important that our discussions of healthy boundary issues stay grounded in our faith traditions and that we take the time to make those connections explicit. So use these resources creatively and don't hesitate to include something from a tradition other than your own. This can help remind participants that we share both the issues and challenges of healthy boundaries as well as the values that can guide us. [This material does not appear in participant's Course Workbooks.]

Before Leading the Session

Before leading the sessions, refer to the following checklist to determine whether you are prepared to teach about this topic.

_____ Watch the DVD at least once, preferably twice.

_____ Familiarize yourself with this teacher's guide.

_____ Consider how you might respond to different audience reactions, such as anger, disclosure, or denial that the problem of inappropriately crossing boundaries exists.

_____ Be aware that sessions may bring up many strong emotions and that members of the audience may be defensive or may have had their trust violated by a spiritual leader.

_____ Prepare for challenges or areas that might be controversial for members of the group.

_____ Look at the scheduling information for each session and select those activities that fit your time frame.

_____ Order the *Healthy Boundaries 101* or *201 Course Workbook* for each participant (order at www.faithtrustinstitute.org or call the order line at 877-860-2255).

Physical Arrangements

- If possible, meet in a room that is ample in size and allows for the flexible rearrangement of tables and chairs.
- If you are presenting to a large group, use two or more monitors or large screens for projecting the DVDs.
- When arranging seats, consider how you might both enhance the viewing of the DVD and facilitate discussion. In some cases a circle will work best; with larger groups, sitting in rows may be unavoidable. Sitting together at tables is ideal for small group discussion.

Discussion Guidelines

- Make use of participants' knowledge and experience.
- Avoid dominating the discussion with your ideas and answers.
- Remember that most of the questions and activities have no clear right and wrong approach; they are intended to increase awareness and stimulate thought.
- Recognize that emotionally charged issues can arise in a group discussion.
- Encourage viewers to listen without interrupting others.
- Recognize that some people learn much from listening and should not be pressed to express themselves before the entire group.
- If someone is angry about an issue brought forward, be sure you understand the point s/he is trying to make. Hostility is often intensified when a discussion leader demonstrates incomplete understanding of a question or comment made by a member of the group.
- If a participant discloses that his/her trust was violated by a spiritual leader, reassure the person of your support. If the disclosure is not appropriate to the discussion and the person seems to want more from the group, suggest that s/he meet with you after the session. Likewise, if a participant discloses that s/he has violated the trust of a congregant or student, suggest that s/he meet with you after the session.
- The intent of this teacher's guide is to stimulate thought and discussion. If, after viewing the DVD or excerpts, the group begins to discuss the issues in a way that is in keeping with lesson objectives, be prepared to omit parts of the planned activities.

SECTION ONE

HEALTHY BOUNDARIES 101—FUNDAMENTALS

Preface

Healthy Boundaries 101—Fundamentals is **an introduction** to healthy boundaries for clergy and spiritual teachers. It assumes that participants have not yet had the opportunity to engage the concepts behind healthy boundaries, particularly the issues of power, authority and vulnerability. So the bulk of the *Healthy Boundaries 101—Fundamentals* material is presenting new ideas and concepts about appropriate boundaries in ministry and teaching. It assumes a one-day workshop format.

The four-part DVD series, *A Sacred Trust*, is the primary resource for *Healthy Boundaries 101—Fundamentals*. In it participants will hear from faith leaders from a wide variety of traditions including Jewish, Protestant, Catholic, and Buddhist. They talk about their experiences, mistakes, and learnings about healthy boundaries in their ministries and teaching. They share a variety of perspectives and opinions and they disagree on some issues. This is intentional. The richness of the discussions pushes participants to be challenged and engaged to think for themselves about their choices in maintaining healthy boundaries.

***A Sacred Trust* DVD is as follows:**

- Part 1: Boundaries, Power and Vulnerability
- Part 2: Dating, Friendships, Dual Relationships, Gifts
- Part 3: The Pulpit, Transference, Hugging and Touch, Intimacy
- Part 4: Personal Needs, Self-Care, Red Flags, Final Reflections

Boundaries are complex and fluid. We encounter a given situation from our own cultural perspective (ethnic, racial, geographical, religious, etc.). So how do we apply basic principles to maintain integrity in relationships in our own particular settings? (See pages 27-34 in the *Healthy Boundaries 101—Fundamentals* participant's Course Workbook for the particular issues facing groups within ministry and teaching.)

In producing *Healthy Boundaries 101—Fundamentals*, FaithTrust Institute has three main objectives:

- To increase awareness of the need for healthy and appropriate boundaries in the clergy/congregant or spiritual teacher/student relationship
- To illustrate the impact of appropriate vs. inappropriate boundaries in promoting effective ministry and teaching
- To provide clergy and spiritual teachers with guidelines and suggestions for developing appropriate boundaries and necessary self-care strategies

BOUNDARIES, POWER AND VULNERABILITY

A Sacred Trust DVD Part I

Learning Objectives


As a result of this session, participants will be able to

- Define boundaries
- Explain the importance of maintaining appropriate boundaries
- Identify the harmful effects on individuals and congregations/sanghas when spiritual leaders overstep boundaries inappropriately
- Explain how boundaries help them deal with complexities in their professional relationships
- Recognize the power they have by virtue of resources and position

Session Scheduling Information

(Adapt to fit your time frame.)

Reading—10 minutes

 DVD viewing—25 minutes

Activity 1—20 minutes

Activity 2—15 minutes

Activity 3—15 minutes

Activity 4—5 minutes

Closing summary—1 minute

Total —91 minutes

Teacher's Summary

We choose to become spiritual leaders for a variety of reasons. Those interviewed in *A Sacred Trust DVD Part 1* speak of their desires to impact lives, provide a compassionate presence, and experience the privilege of being with people during the most holy and significant moments of their lives. They see it as their responsibility to be guardians and protectors of sacred space and to pass on texts and traditions.

In spite of our good intentions, those of us in positions of spiritual leadership sometimes find ourselves causing pain. Often this is due to our being unprepared to deal with the complexities of interpersonal relationships. Understanding boundaries can help us manage the difficulties inherent in our role. Knowledge of what is appropriate, what is not, and whether an action is in the best interests of our congregants or ourselves can help us avoid unhealthy situations.

Like those we serve and teach, we need love and intimacy, friendships, and affirmation. When we turn primarily to our congregants to meet those needs—that is, to take care of us—we often end up violating boundaries.

The issue of boundaries cannot be separated from an awareness of power disparity. Though as clergy/teachers we may at times feel powerless, by virtue of our education and position as spiritual leaders we, in fact, have resources and authority. At the same time congregants

sharing intimate information or seeking our help are vulnerable. The spiritual leader who honors this power dissimilarity is more likely to take care in crossing boundaries and avoid violating the congregant's trust.

Read and Discuss—10 minutes

Refer participants to p. 5 in their Course Workbook. Read aloud "God Marked a Line and Told the Sea." Discuss the following questions: What do they hear in this metaphor of the sea? What about the paradox of freedom and boundaries?

This discussion should help participants begin with a theological context for affirming the value of boundaries in our lives and for a realization of the damage that can be done when the sea overrides its boundaries.

 **VIEW A SACRED TRUST DVD PART 1—25 MINUTES**

Activity 1—Nature of Boundaries—20 minutes

This can be done as either a small group or large group discussion. If you choose to divide into small groups, consider printing each of the following quotations from the DVD on a separate piece of paper and giving each small group a single quotation.

Ask the group to draw from their experience to expand upon the statements.

1. "You have a sacred trust." What does this statement mean to you?
2. "Ministry is the language of intimacy." How is this so? How does this truth affect our relationships with congregants?
3. "Boundaries keep us from being over-whelmed by other people's stories." How does this happen?
4. "We know what boundaries we can cross and when it's in the best interests of the person to do so." Under what circumstances might it be in the best interest of the congregant to cross a boundary? How might we recognize when it is?
5. The term "psychic whiplash" is used to describe the conflict between being there for people and not getting too close. What do you think the speaker means? What has been your experience with psychic whiplash?
6. "We need to pay attention to power." What are the indications that we have power? Where does it come from? What kinds of circumstances make us want to step over a boundary and assert our power? (Again, cultural particularity may help in discussing how differently ministerial power is sometimes viewed within a particular community.)
7. "Boundaries let me know who I am versus who you are and how to keep being me without merging into you." Why is that important?

Activity 2—Boundary Crossing vs. Boundary Violation—15 minutes

Separate the group into small groups of three or four. Tell the groups that the DVD reminds us that we have become spiritual leaders to do good, not harm. However, we are often not prepared for the complexity of our role and don't understand how hurt and pain can come out of our good intentions.

The questions to discuss are as follows:

1. Give examples of appropriate and inappropriate boundary-crossing behavior in congregational /sangha relationships.
2. Discuss the impact of both on establishing and sustaining trust in the relationship.

Invite participants to speak to their own particular cultural experiences and to share how the two questions might be understood in the context of their faith communities.

If time and space allow, give groups sheets of newsprint and markers for this activity. Suggest that they create two columns, one for appropriate examples and one for inappropriate examples. Beneath each example they are to record its impact, as posed in the second question. Post the sheets and allow time for a brief discussion in the larger group.

Conclude the activity by working as a large group to develop a definition of boundaries. Make sure the definition includes ways in which boundaries are helpful.

Activity 3—Exercise: Self-Evaluation—15 minutes

Refer participants to p. 8 in their Course Workbooks to read and reflect on the Self-Evaluation questions listed.

Activity 4—Journal: Concept of Power—5 minutes

Suggest that participants use the Notes section on p. 8 of their Course Workbooks.

Explain that writing our thoughts without censoring them often helps us gain new insights. In each session you will present a word for participants to think and write about. It is an opportunity for them to let their thoughts flow without regard for organization or grammar. They may feel more compelled to write about an insight they have gained from the session. That's okay.

The word for this session is power. For those who need help getting started, suggest that they consider the meaning of power, its significance, and their own power as it relates to their position as a spiritual leader.

These thoughts will remain private unless attendees wish to share them during unstructured time.

DATING, FRIENDSHIPS, DUAL RELATIONSHIPS, GIFTS

A Sacred Trust DVD Part 2

Learning Objectives


As a result of this session, participants will be able to

- Identify problems inherent in dating a student/ congregant
- Identify the potential hazards of maintaining friendships within the congregation/sangha
- Recognize dual relationships and how to manage them
- Identify problems related to accepting gifts

Session Scheduling Information

(Adapt to fit your time frame.)

Activity 1—10 minutes

 DVD viewing—27 minutes

Activity 2—40 minutes

Activity 3—5 minutes

Closing summary—1 minute

Total—83 minutes

Teacher's Summary

In *A Sacred Trust DVD Part 2*, spiritual leaders share their insights and experience with boundary issues related to dating, friends, dual relationships, and gifts. Because boundary issues are complex, the DVD does not purport to tell viewers what they should do in any given situation. Instead, the intent is to increase awareness among clergy and teachers so they are better able to make wise decisions.

Clergy and teachers who are single must often decide whether to date a person in their congregation/sangha. It is, after all, a place to meet someone with similar values and commitments. To date a congregant, however, introduces myriad complications and possibilities for misunderstandings.

Everyone needs a close friend. Choosing one from among congregants/students can also have negative repercussions. There is a difference between being friendly and being a close friend who shares confidences.

Living in a small town or rural setting increases the difficulty in finding suitable dating partners and friends. Spiritual leaders in such places may have to search for close relationships outside their immediate community.

Dual relationships are those in which a spiritual leader and congregant/student have additional roles, such as client or patient. For example, if the student is also the teacher's physician, or if the congregant is also the rabbi's plumber, the relationship has the

potential to adversely affect a congregation/sangha. Dual relationships can sometimes be unavoidable but carefully managed.²

The multiple-staff congregation may also present a challenge in dual relationships. For example, lay members of a staff may be members of the congregation where they work. They may not be aware of the issues of a dual relationship in which their supervisor is also their spiritual leader. It is preferable that they choose to attend another congregation or seek pastoral care or spiritual guidance from another clergy person or teacher. But if not, the issues of this dual relationship should be discussed up front so that both the staff member and spiritual leader can manage the situation.

Gifts present another possible problem. Where is the line between what is appropriate to accept and what is not? The DVD suggests a common-sense approach. Some gifts can be accepted with a heart-felt thank you; others need to be graciously declined.³

2 In Buddhist communities, another area where dual relationships may occur is in the composition of the Board of Directors of the sangha. It is common for spiritual teachers to serve on the Board; yet we are not always aware that skills in organizational leadership are different from the skills and experience needed to be a good spiritual teacher. It is often a challenge for us as teachers to step aside and let others take on Board leadership.

3 It is important to acknowledge that the context for giving and receiving gifts can be quite different in the Buddhist tradition. Dana, or generosity, is the tradition of students and lay people providing financial support to teachers and monastics. This is very different from the situation in a church or synagogue where the clergy person receives a salary as religious leader of the congregation. In many branches of Buddhism, it is the dana from lay people and students that has enabled Buddhism to survive. In this context, the issue is not the size of the gift or its monetary value, but rather our ability as teachers to examine whether we are developing preferences for those students who give larger gifts, and to refrain from devoting more time or energy to students based on the size of their donations.

Activity 1—Exercise: Gifts—10 minutes

As participants enter, refer them to the exercise on Gifts found on p. 11 in their Course Workbooks. Ask participants to respond to the list by placing one check mark on the line if they have accepted the item, two checks if they felt uncomfortable, three check marks if they turned the gift down. Ask them to reflect on why they felt uncomfortable or why they turned down the gift. (For Buddhist teachers in traditions where dana from students is an accepted form of ongoing financial support, ask them to put four check marks if they developed preferences for the student offering them the gift, and noticed they were devoting more time or energy to this student.)



VIEW A SACRED TRUST PART 2—27 MINUTES

Activity 2—Relationships & Gifts—40 minutes

In preparation for this training, make a copy of p. 20 of this Teacher’s Guide. Cut the copy into strips so one case description appears per strip of paper.

Separate participants into small groups and distribute a case study to each group for discussion. Their assignment is to come up with several specific guidelines for their case from the categories of Dating, Friends, Dual Relationships, Gifts that appear on page 9 of their Course Workbook. Suggest that they include discussion about the particular issues they might face in their cultural, ethnic, or geographical setting. What complications may arise? What norms and expectations are operative?

After 15 minutes in small group discussion, return to the large group and debrief with the suggested guidelines from the small group discussion.

(Remarks in parentheses serve as reminders of suggestions in the DVD.)

1. Dating. (If the other person also wants to pursue the relationship, urge her/him to turn to someone else for spiritual guidance. Also inform the governing body and supervisor of the relationship.)
2. Friends. (Avoid making others feel excluded; at congregational/sangha gatherings, spread attention among everyone.)
3. Dual relationships. (Avoid them or keep them to a minimum; with the congregant acknowledge and discuss how you both want to handle the dual relationship so that you are both working to manage the complexity.)
4. Gifts. (Be sure the giver doesn’t expect anything in return; use common sense; be gracious and say thank you; politely decline expensive gifts; try to apply a sense of humor.)

ACTIVITY 2: CASE STUDIES FOR DISCUSSION

1. You are the sole pastor/rabbi/spiritual teacher in a rural area. A member in your congregation/sangha has been especially nice to you. She/He drops by your house unexpectedly three times a week and stays awhile to visit. She/He regularly bring you gifts: flowers, books of poetry, CDs. At first you experienced this as friendliness, but it has begun to feel intrusive of your private time. How do you handle the situation?
2. You are a twenty-eight-year-old single pastor/rabbi/spiritual teacher. A couple in your congregation/sangha with a single daughter/son your age has been especially friendly. At first they dropped by your house unexpectedly, delivering fresh vegetables from their garden. Now they are regularly inviting you to their house for dinner, where their attractive daughter/son is also present. She/He too is a member of the congregation/sangha. You feel attracted to her/him. How do you handle this?
3. Your oldest child is in fifth grade. His/her teacher is a member of your congregation/sangha and has come to you seeking help with some personal problems. Your child has a learning disability, and the teacher is known to be excellent in working with children with special needs. How do you handle this?
4. You are the pastor/rabbi/spiritual teacher of a small congregation/sangha. You have four young children, and your salary barely supports the family. Your ten-year-old car has been in the mechanic's garage more than it has been in yours. A member of your congregation/sangha owns a car dealership and has offered to give you a great price on a two-year-old van. How do you handle this? Be specific about particular cultural differences in this area.
5. A member of your congregation/sangha is on the police force of your medium-sized town. One day, not recognizing your car, she stops you for not coming to a complete stop at a stop sign. When she sees you are the driver, she says she'll let it go this time. How do you handle this?

Activity 3—Journal: Concept of Friendship—5 minutes

Refer participants to p. 10 in their Course Workbooks and suggest that they spend a few minutes writing their thoughts on the term friendship. For those needing help getting started, suggest they consider the following: Do they have a close friend? What do they need in a friend? Where can they find friendship? Has a friendship ever negatively impacted their professional work? These thoughts will remain private unless attendees wish to share them during unstructured time.

Closing Summary—1 minute

Today we've looked at four areas where boundaries can be unclear. It's not always easy to discern what is in the best interests of the other person. Sometimes our own needs get in the way. Because we can be blinded by them, we need a structure of accountability—a spiritual director, teacher, or colleague—to help us.

Again we've been reminded that to keep from crossing boundaries inappropriately we need to practice self-care. Today's session has made us aware of our needs for friendship and life partners, for expressions of appreciation. Taking care of ourselves requires that we make sure those needs are met, preferably in places other than our congregations/sanghas. We may have to go to other towns or outside our faith tradition.

THE PULPIT, TRANSFERENCE, HUGGING AND TOUCH, INTIMACY

A Sacred Trust DVD Part 3


Learning Objectives

As a result of this session, participants will be able to

- Describe unethical uses of the pulpit
- Define transference
- Recognize the appropriateness or inappropriateness of touch in counseling situations
- Describe the manner in which sexual intimacy and spiritual intimacy are sometimes confused
- Apply new awareness about boundary issues to a case

Session Scheduling Information

(Adapt to fit your time frame.)

-  DVD viewing—26 minutes
- Activity 1—20 minutes
- Activity 2—30 minutes
- Activity 3—5 minutes
- Closing summary—1 minute
- Total—82 minutes

Teacher's Summary

A respect for boundaries protects relationships in which one individual has more power than the other.

A sermon or a dharma talk is a tool for exercising power and authority. Usually it is used for positive ends, as when we challenge injustice, promote scriptural teachings, or encourage listeners. Sometimes, however, we are tempted to use the pulpit for our own purposes. We may try to further our own agenda, as when there's conflict within the congregation/sangha, or promote ourselves as excellent communicators. When we give in to these temptations, we can violate boundaries.

Transference is confusing feelings one has about one person with feelings for another. For example, those who turn to us as leaders or teachers may confuse their feelings toward us with emotions they associate with a parent or sibling. A man whose mother was cold and distant may become especially fond of a female spiritual guide who is warm and nurturing. Such a reaction adds to the vulnerability of the congregant or student. If we use the attachment for our own gratification, we have stepped over a boundary inappropriately.

Though the DVD does not deal much with counter transference, it is important to know that it is our inappropriate response to transference. Counter transference distorts our perception

of others, allowing us to interpret their transference in a manner that satisfies our needs. For example, we interpret their notion that we are wonderful as a sexual come-on.

In some cultures, touch—whether it is a handshake greeting, a pat on the back, a hug of support, or a hand held in prayer—can be a very important aspect of pastoral care. In those contexts such boundary crossings are appropriate and healing. In other situations, however, especially for people who have a history of physical and/or sexual abuse, these same boundary crossings may be inappropriate and harmful. Discerning when touching is in the best interest of the congregant or student is one of the challenges of ministry and spiritual leadership.

Many of those we serve and teach have intense emotional needs. Sometimes we wrongly conclude that our touch will help satisfy their needs. Congregants may even ask us to hold them. In these situations our physical presence without touching may be the most helpful response.

When touch in the pastoral or teaching relationship is primarily about meeting our needs, we are in trouble. For example, a preacher once announced from the pulpit, “I haven’t had enough hugs this week.” He was saying to his congregation, “You need to hug me more often.” Using the power of the pulpit, he was presenting his needs for affection as an expectation of his congregants. With feedback from his colleagues, he began to realize that this was not the dynamic he wanted to set in motion.

Part 3 defines spirituality as the “intimate connection between ourselves and God,” and sexuality as the “intimate connection between ourselves and another person.” Sometimes these intimacies become confused for both the congregant and spiritual leader. Sometimes the congregant misinterprets our attempts to convey warmth. There are times too, when we use our power and position to get our own emotional needs met. We create an atmosphere of intimacy that will draw the other person to us. Not only does becoming sexually involved with a congregant do him/her great harm, it can harm the congregation/sangha as well.

Because teachers and clergy are in positions of power, we may be seen as “sexy.” As transmitters of that which is holy and sacred, we may become the objects of sexual attraction initiated by students or congregants. It is our responsibility as teachers and clergy to understand that this is an expression of attraction to the power of the sacred, rather than to us as individuals, and not to take it to be about us. It is our job to ensure that the spiritual aspect of the relationship remains primary, and to help congregants/students understand that our role is to serve as their teacher/clergy person.



VIEW A SACRED TRUST DVD PART 3—26 MINUTES

Activity 1—Discussion: Pulpit, Transference, Hugging and Touch, Intimacy—20 minutes

Refer participants to p. 13 in their Course Workbooks. Debrief the viewing of the DVD using the following questions with the entire group.

Pulpit

- Give an example of when you have inappropriately crossed a boundary in preaching/speaking (e.g. self-disclosure or disclosure about family or congregants).
- What personal needs might influence us to cross this boundary?
- How can we handle those needs so as not to give in to this temptation?

Transference

- Give an example of an experience of transference from a congregant or student.
- What personal needs might influence us to respond to transference by crossing boundaries?
- How can we handle those needs so as not to give in to this temptation?

Hugging and touch boundaries

- What guidelines might help us discern the difference between appropriate and inappropriate touch in pastoral or teaching settings?
- What personal needs might lead us to inappropriately cross touch boundaries?
- How can we handle those needs so as not to give in to this temptation?

Intimacy

- What dynamics lead us to confuse spiritual intimacy and sexual intimacy in a pastoral or teaching setting?
- What personal needs might lead us to step over sexual boundaries?
- How can we handle those needs so as not to give in to this temptation?

In the DVD, Rabbi Schwartz discusses sexual energy that may be present when meeting or counseling with a congregant or student. She suggests that it is sometimes helpful to acknowledge this reality in order to move beyond it. What are the pluses and minuses of this approach? Discuss how naming sexual energy with a vulnerable congregant can be experienced as sexualizing the encounter. What other strategies might we use to deal with sexual energy in response to a congregant or student?

Activity 2—Case Study: Concept of Spirituality and Sexuality—30 minutes

Make copies of the following case study and questions to use as a handout. Direct the participants to form small-groups and discuss the case and the questions. After 15 minutes bring large group back together to allow the group to share ideas and learnings.

Mary Lou is a forty-one year old single mother. For several years she has been trying to raise three boys on her salary as a drugstore cashier. Lately Rabbi Steve has been preaching/teaching a series on repairing broken relationships with others and with God. Mary Lou has expressed her appreciation for the series and has four times invited him to her home to personally discuss the ideas and feelings the series has stirred in her. Each time, upon his arrival, she has had coffee and freshly baked cookies ready. Her conversation has been animated, and she has pressured him to stay longer than he intended. After the third and fourth visits, as Rabbi Steve has started to leave, she has grabbed hold of him and given him a big hug.

- Why did Mary Lou invite Steve to her home?
- How might Steve interpret her invitations?
- How should Steve handle the situation?

Alternate Activity 2—20 minutes

The following activity relates to the impact that inappropriate boundary crossing has on religious groups. It calls for seven people to play roles. If your group is small, you may choose to pretend that you are all sitting around the dinner table. A larger group should be divided into subgroups of seven. Give each participant a copy of the following case.

Paula is the dynamic new pastor/rabbi/teacher who has recently come to the congregation/sangha. She is thirty-one and single. Unlike her predecessor, she is an excellent speaker, enlivening services and meetings with energy and a sense of humor. She is also different, in that she displays affection effusively, hugging and touching all the men. It's clear to everyone that she especially likes one of the young married men.

Paula's first action is to drastically change the service/meeting atmosphere. She considers it important that the music rock a little and that electronic accompaniment be used. She has also spoken publicly and in committee meetings about the building being in an unsuitable community. Six months after her arrival she is urging the congregation/sangha to sell its property and buy a triple lot over in a new housing development. By now many members are growing dissatisfied.

Your group represents members of two families from that congregation/sangha, having dinner together after a service/meeting. Each of you is to play the role of someone at the table: an elderly person, a teenage girl or boy, her/his divorced mother, a lesbian couple in their forties, and a heterosexual couple in their early twenties. Conversation turns to Paula. All of you are feeling dissatisfied but have never said much. This is your first honest discussion. Talk about the situation from the various viewpoints. How do you begin to make sense of where the congregation/sangha is and where it should be heading? Try to incorporate this session's themes: the pulpit, counter transference, touching and hugging, and intimacy. Avoid making this a gripe session; rather talk about the impact of Paula's leadership on your faith community.

Discussion Wrap-Up

Bring the groups back together. Ask them to share conclusions about how congregations/sanghas are affected when spiritual leaders misuse their power.

Activity 3—Journal: Concept of Spirituality & Sexuality—5 minutes

Refer participants to the Notes section on p. 14 in their Course Workbook to use for this activity. Remind them that writing without censoring any of our ideas often helps us clarify our thoughts.

Suggest that individuals spend a few minutes writing their thoughts on spirituality and sexuality. To help them get started, you might tell them to consider the following: How do they view the connection? How has the confusion impacted their ministry?

These thoughts will remain private unless attendees wish to share them during unstructured time.

Closing Summary—1 minute

We have been discussing the boundaries related to preaching, transference, touching, and sex. The lines between what is appropriate and what is inappropriate are often unclear. But we can't always trust ourselves to be discerning. We need a means of accountability: a spiritual advisor or a colleague.

Again we've been reminded that to keep from crossing boundaries inappropriately we need to practice self-care. Today's session has made us aware of our own needs for self-esteem, for touch and intimacy. How do we get those needs met? Self-esteem comes from being loved and from succeeding at tasks, whether they are related to jobs or hobbies. Taking time to maintain relationships with friends, partners, or children can satisfy our needs for touch and intimacy.

EMERGING ISSUES IN MAINTAINING HEALTHY BOUNDARIES

Learning Objectives

As a result of this session, participants will be able to

- Consider boundary issues in use of social networking
- Consider potential areas of risk
- Assess use of social networking for individuals and organization

Teacher's Summary

In the early days of addressing the importance of healthy boundaries for faith leaders, some people assumed that all that was needed to prevent boundary violations by clergy and spiritual teachers was to establish a policy, do a basic training, and check that box as completed. This approach establishes the rules, tells people about the rules and the consequences of violating the rules, and assumes that this will take care of the problem.

But the “problem” is multifaceted, complex and nuanced. The risk of violating boundaries in our pastoral and teaching relationships is always before us. The rules can give us clarity about where our faith community stands, what it expects from us, and what will happen if we choose unwise or exploitative conduct. But the work of living out healthy boundaries as a pastor or spiritual teacher belongs to each of us and is an everyday challenge. The work of deepening our understanding of healthy boundaries never ends and one of the reasons is that there are new challenges at every turn. These new challenges are emerging issues: complex boundary situations that we could not have anticipated ten years ago.

The work on healthy boundaries is ongoing because it is at the core of our understanding of ministry and teaching. Many faith groups have begun to realize this and to realize the need to do regular healthy boundary training that expands and deepens our awareness and its application to our work.

So as new issues and situations emerge that raise questions about appropriate behavior, the framework to help clergy and spiritual teachers address these issues is in place. We just need to apply our awareness of and commitment to healthy boundaries to these emerging issues. We need to bring the lens of our theological understanding, our analysis of power and vulnerability, and our strategies for self-care and accountability to these new issues.

Session Scheduling Information

(Adapt to fit your time frame.)

Introduce Topic—5 minutes

Activity 1—5 minutes

Activity 2—35 minutes

Activity 3—15 minutes

Activity 4—5 minutes

Closing summary—1 minute

Total—66 minutes

How do we bring the resources of our status, knowledge, and experience as faith leaders to the benefit, not the detriment, of our congregants?

Social Networking

One example of an emerging issue is social networking. Like any tool, social networking can bring great benefit or great harm. How do we apply our knowledge and practice of healthy boundaries to our use of this tool?

This section includes some suggestions to assess our use of social networking in the context of healthy boundaries.

Activity 1—Exercise: Self-Assessment—5 minutes

Refer participants to p. 16 in their Course Workbooks to complete the Self-Assessment exercise.

Activity 2—Small Group Discussion: Critical Questions—35 minutes

Ask participants to form small groups to consider the Critical Questions listed on p. 16 in their Course Workbooks. Bring the large group together after 20 minutes and ask small groups to present their responses.

Activity 3—Small Group Discussion: Faith Community Considerations—15 minutes

Ask participants to form small groups to discuss the Faith Community Considerations listed on p. 16 in their Course Workbooks.

Activity 4—Journal: Social Networking—5 minutes

Refer participants to the space on p. 16 in their Course Workbooks to use for this activity. Suggest that individuals spend a few minutes writing about their responses to the Self-Assessment exercise.

Closing Summary—1 minute

We have been discussing emerging issues and social networking in the context of healthy boundaries. Certainly, there are other examples to draw on. What is most important is that we continue to apply our awareness of and commitment to healthy boundaries to these emerging issues.

PRESERVING BOUNDARIES: PERSONAL & PROFESSIONAL HEALTH

A Sacred Trust DVD Part 4

Personal Needs & Self-Care—Red Flags—Final Reflections


Learning Objectives

As a result of this session, participants will be able to

- Identify the pressures that congregations/sanghas place upon them
- Identify areas in which they are taking care of personal needs and areas where they could improve
- Outline a self-care plan

Session Scheduling Information

(Adapt to fit your time frame.)

-  DVD viewing—26 minutes
- Activity 1—30 minutes
- Activity 2—15 minutes
- Activity 3—5 minutes
- Activity 4—20 minutes
- Closing summary—2 minutes
- Total—98 minutes

Teacher's Summary

For those in positions of spiritual leadership, the tension often exists between being who our congregants expect us to be and being who God wants us to be. Many congregations/sanghas expect spiritual leaders to forego personal needs and be available twenty-four hours a day, seven days a week, to all people. However, we cannot effectively do the work of God unless our personal needs are being met outside of our work setting. Among those needs are love, affection, recreation, and affirmation.

“Our job is not to become a perfect professional but a healthy human being,” Rev. Luis Carriere says in the DVD. A healthy pastor/rabbi/spiritual guide is one who understands his/her needs and works in appropriate ways to get them met. Self-care is a discipline, a decision that must be made every day. The healthier our intimate relationships and our parenting are, the less likely we are to violate boundaries.

How do we recognize that our needs are not being met? We know they are not being met when we find ourselves seeking romantic love and affirmation from those we have promised to serve. There are other clues: discovering that we harbor resentment, finding ourselves fantasizing about a congregant or going out of our way to be with him/her, dressing a particular way because we know we will be seeing a particular congregant or student, and telling ourselves that we can serve an individual in a way no one else can.

To prevent our turning to congregants or students to get our needs met, it is important that we regularly meet with a colleague, spiritual director or spiritual teacher. As there is

no formula for navigating relationships, we need to ask ourselves frequently when working with congregants, “What’s my role?” and “Who is this for?”

 **VIEW A SACRED TRUST PART 4 —26 MINUTES**

Activity 1—Discussion: Guidelines for Personal & Professional Health—30 minutes

Form small groups of three or four and ask participants to read and reflect on the Guidelines listed on p. 17 in their Course Workbooks.

Provide groups with sheets of newsprint. Remind them that on the DVD Rev. Luis Carriere says, “Our job is not to become a perfect professional but a healthy human being.”

- Direct each group to use half of their newsprint to create a list of expectations that are placed upon spiritual leaders by their congregations/sanghas.
- Ask the groups to circle expectations that they believe are realistic and appropriate.
- Next, suggest that group members draw lines through any expectations that are unrealistic and that may contribute to unhealthy expectations of spiritual teachers.
- Have participants use the other half of the newsprint to make a list of things that they need in order to provide healthy leadership (e.g. time off, family privacy, etc).
- Finally, allow time for discussion within the small group on specific ways they might help their congregations/sangha handle unrealistic expectations of the spiritual leader and understand the necessity for maintaining healthy boundaries?

Activity 2—Exercise: Self-Care Inventory—15 minutes

Refer participants to the Self-Care Inventory on p. 19 in their Course Workbooks. When they have finished responding, ask them to form pairs. Individuals are to select one or two self-care goals and discuss how they might implement such a plan. If time allows, encourage participants to share with the larger group any insights they gained.

Activity 3—Exercise: Self-Assessment Checklist—5 minutes

Refer participants to the Self-Assessment Checklist on p. 21 in their Course Workbook. Explain that the tool is meant to be completed by them outside of the session, preferably in consultation with a therapist, spiritual director, or trusted colleague. Take a few minutes to review the page and answer any questions about the assessment.

Activity 4—Case Studies: Healthy Boundaries and Peer Support— 20 minutes

When all is said and done, how can we take responsibility for the choices and challenges we face regarding boundary crossings? We need support and we need to know how we

can be accountable. For clergy and spiritual teachers who are motivated to be self-aware and insure that boundary crossings don't become boundary violations, the opportunity to consult with peers who are equally motivated can be very helpful. We strongly urge clergy and spiritual teachers to form peer support groups where they can bring their confusion, questions, mistakes, etc., to discuss, process and find support. A regular monthly or quarterly meeting can create this opportunity. It also can be useful to form this group with colleagues outside of one's own immediate network.

Refer participants to p. 23 of their Course Workbook. This exercise is an opportunity to practice seeking consultation from professional peers. Separate into small groups for role play of each case study listed. Be sure that participants follow the directions identifying one person to present the case as their own to their peers who will then consult and help their colleague sort out what they want to do in this situation. Allow 10 minutes of role play time. Then return to the large group and debrief with a focus on each particular case study. What did the presenters learn? What did their colleagues do that was helpful? Take another 10 minutes for debrief.

This exercise allows participants to practice peer support even in this short, artificial situation which hopefully will encourage them to see the value and then establish a peer support group for themselves. Hopefully they will utilize all that they have learned in this course. It is a good way to conclude the training.

Closing Summary—2 minutes

In this session we looked at self-care issues. We discussed the pressures that are on us and how we might deal with demands to put aside our personal needs. We set some goals for taking care of ourselves. Invite the group to name healthy ways that they are getting their needs met.

SECTION TWO

HEALTHY BOUNDARIES 201—BEYOND BASICS

Preface

Study and reflection on healthy boundaries in ministry or teaching is not a one-time learning experience. It is an ongoing discipline in which we bring our knowledge and desire to maintain the integrity of our pastoral or teaching relationships to bear on our day-to-day experiences. Continuing education and reflection support these efforts.

Increased self-awareness of healthy boundaries need not make us more self-conscious and anxious about being politically correct or avoiding making mistakes and violating boundaries. Increased self-awareness can enable us to integrate our understanding and our ethical choices so that they become second nature, simply how we do ministry or how we teach. *Healthy Boundaries 201—Beyond Basics* moves us in that direction.

Healthy Boundaries 201—Beyond Basics is an **advanced discussion** of healthy boundaries for clergy and spiritual teachers. It assumes that participants have already been exposed to an introductory discussion of healthy boundaries (either *Healthy Boundaries 101—Fundamentals* or some other program). Building on that foundation, *Healthy Boundaries 201—Beyond Basics* takes participants deeper into the affirmation of boundaries, theology of boundaries and power and vulnerability. It also introduces the application of the fundamental principles to immediate, contemporary situations such as internet technology and social media in the section, “Living With Healthy Boundaries.”

Healthy Boundaries 201 is divided into **core material** and **modules**. The core material can be covered in 4 hours. Module timing depends on the topic selected. See each **Session Scheduling Information** for approximate timing.

Core Material:

- Joy of Boundaries
- Boundaries and Theology
- Power and Vulnerability

Modules:

- Living With Healthy Boundaries
 - Boundaries and Internet Technology
 - Boundaries and Social Media
 - Boundaries and Finances
 - Boundaries and Sexual Attraction
 - Boundaries and Self-Care

Healthy Boundaries 201—Beyond Basics assumes that the majority of participants are motivated to maintain healthy boundaries in their ministry or teaching. It is intended to address potential wandering behavior with increased self-awareness and critical thinking skills. Remember that like *Healthy Boundaries 101*, *Healthy Boundaries 201* cannot adequately confront predatory behavior.

The Challenge of Mandated Training

Most of you who are teaching *Healthy Boundaries 201* will be presenting to your peers who are required by their judicatory or organization to attend the training. While we strongly encourage mandated training on healthy boundaries, this does mean that some people are there only because they have to be and some of them may be resistant or even hostile. They may feel that this is a waste of time, they've heard it all before, and it has nothing to do with them. We have designed *Healthy Boundaries 201* to challenge these assumptions: they will find the experience to be valuable, there will be new and interesting ideas to consider, and it has everything to do with everyday ministry or teaching. They may also be expecting that you as the teacher will simply lecture them on "keeping their hands to themselves and their doors open" while they sit passively and absorb (or shut out) this information, then check the box and depart. This will not happen in *Healthy Boundaries 201*.

Participants will do most of the work in *Healthy Boundaries 201*. They will be challenged to consider their options and choices in the midst of complex boundary situations. No easy answers here; rather the tools for living with healthy boundaries in ministry or teaching with the bottom line being "Stop and Think" before you act.

You as teacher will provide various stimuli for their conversations. Your job is to help guide these conversations in productive ways and create space for them to struggle with the finer points of healthy boundaries.

Using excerpts from *A Sacred Trust* and *Once You Cross the Line* DVDs, poetry, literature, sacred texts and exercises, *Healthy Boundaries 201—Beyond Basics* expects more from the participants in terms of teaching critical thinking and decision making. We are equipping participants to be able to deal with whatever boundary challenges they encounter in their work. The Teaching *Healthy Boundaries Teacher's Guide* reflects this shift in pedagogy for *Healthy Boundaries 201—Beyond Basics*.

THE JOY OF BOUNDARIES

Learning Objectives

As a result of this session, participants will be able to

- Address the common resistance to the idea of boundaries as a limit on freedom
- Reflect on the nature of boundaries by using images of walls, fences, etc.
- Consider the difference between boundary crossing and boundary violation
- Evaluate our emotional boundaries with congregants or students

Goal

To recognize and affirm the value of boundaries particularly in our ministerial and teaching relationships.

“I think boundaries are a gift. I think that boundaries are the thing that gives shape to our relationships, all of our relationships.” – Rev. Dr. Marie M. Fortune

In a culture which celebrates the absence of boundaries as individual freedom, it is sometimes difficult to recall the value of boundaries in our lives and in particular, in our ministry or teaching. But without boundaries, we cannot really be in relationships. With boundaries, we develop trust in relationships and minimize the potential to cause harm.

Even though *Healthy Boundaries 201* assumes a basic understanding of boundaries in ministerial and teaching relationships, we should always begin by addressing the fundamental ambivalence many people feel about boundaries in general. We want to address this common resistance and help participants to arrive at some degree of ownership and appreciation for boundaries.


Note: This section in the participant’s Course Workbook begins on p. 5 with the Goal statement. However, we recommend that the section activities begin by discussing the **Introduction—The Nature of Boundaries** (see next page) which leads to a discussion of Robert Frost’s poem, “The Mending Wall” found on p. 7 of the participant’s Course Workbook. This is followed by DVD excerpts which lead into **Revisiting the Basics** back on p. 5 of the participant’s Course Workbook.


Session Scheduling Information

(Adapt to fit your time frame.)

Introduction—5 minutes

Activity 1—15 minutes

 Activity 2—5 minutes

 Activity 3—10 minutes

Activity 4—10 minutes

Activity 5—15 minutes

Activity 6—15 minutes

Total—75 minutes

By beginning with visual images, poetry and DVD commentary, we intend to engage participants on a level that hopefully reaches beyond any initial resistance they may have to being at a mandated training workshop.

Introduction—The Nature of Boundaries—5 minutes

Use three pictures to help participants reflect on the nature of boundaries. As you show each image, ask participants to name what each image brings to mind in the context of boundaries. The first image is of a lone person in the middle of a field with no boundaries which is at once inviting (wide open space and freedom) and unnerving (lost and alone). Contrast this with the second image of a fence (open and porous but still a boundary) and the third image of a solid wall (not porous at all). Help participants to name the benefits and limitations presented in each image.

Activity 1—Discussion: “The Mending Wall”—15 minutes

Refer participants to “The Mending Wall” by Robert Frost on p. 7 of their Course Workbooks. Read the poem aloud, and then break into small groups to discuss these questions: What is Frost’s resistance to the wall? How do his sentiments reflect your ambivalence about boundaries in ministry? After 10 minutes of small group discussion return to the large group for final thoughts.

Using this poem is a good way to both acknowledge the ambivalence and also affirm the importance of boundaries. Refer to “Commentary on Boundaries and Relationships” on p. 8 of participant's Course Workbook for more information.

Activity 2—DVD and Discussion: Boundaries Are A Gift—5 minutes

View DVD Excerpt #1 “Gift” from your *Teaching Excerpts* DVD. This excerpt helps us understand the value of boundaries as a resource in framing all of our relationships.



DVD Excerpt #1—“Gift” (51 sec.):

“I think boundaries are a gift. I think that boundaries are the things that give shape to our relationships—all of our relationships. And there are different boundaries that are appropriate in different kinds of relationships.”

– Rev. Dr. Marie M. Fortune, FaithTrust Institute

“One of the difficulties in ministry is that we misunderstand boundary setting with not being nice. A lot of people believe that boundary setting is a rude experience. Through my filters, I believe that boundary setting is an act of grace.”

– Rev. Luis Carriere, Free Methodist

“Boundaries make it safe in relationships. They let me know who I am versus who you are, and how to keep being me without merging into you. So that boundaries become a very helpful thing. And they kept me from getting overwhelmed by other people’s stories as well.”

– Rabbi Julie Schwartz, Reform Judaism

After viewing the excerpt, ask for reactions from the large group. Then review **Revisiting the Basics** on p. 5 of the participant’s Course Workbook.

We must always begin by remembering the two basic goals of healthy boundaries between clergy/spiritual teachers and congregants/students:

- to maintain the integrity of the ministerial or teaching relationship and
- to protect those who are vulnerable: congregants, clients, employees, students, staff, etc.

Activity 3—DVD and Discussion: Fundamental Question—10 minutes

View DVD Excerpt #2 “Questions” from your *Teaching Excerpts* DVD. This excerpt points out the complexity of boundary issues in the ministerial or teaching relationship and helps us to ask the right questions when we are considering crossing a boundary.



DVD Excerpt #2—“Questions” (1 min. 2 sec.):

“We are in people’s homes—and therapists, spiritual directors, doctors, and attorneys are rarely in people’s homes—praying with them, sitting with them, maybe having coffee with them. That’s a level of trust and acceptance that a therapist would unlikely have with somebody. Because of that, I think it’s harder to see the boundaries.”

– Rev. Gail Crouch, United Church of Christ

“The fundamental question we have to ask ourselves at whatever point that we may be relaxing boundaries, or wanting to relax boundaries in a particular setting, is: am I doing this at the expense of the congregant? Is it in their interest that we do this? And what about the impact on the congregation and on the mission that we share?”

– Rev. Dr. Marie M. Fortune, FaithTrust Institute

After viewing this excerpt, ask for reactions from the large group. Then return to p. 5 in the participant’s Course Workbook to review the question that we should ask ourselves when considering crossing boundaries: What is the likely impact *on* or potential harm *to* the individual congregants? The congregation itself? Our shared mission? These questions help us to stay grounded in the context of our ministry/teaching and remind us that our choices to cross boundaries impact the lives of individuals and the community.

Activity 4—Discussion: The Development of Our Understanding of Boundaries—10 minutes

Refer participants to p. 9 of their Course Workbooks. Read aloud “The Hippocratic Oath” and then discuss the questions in large group. The Hippocratic Oath is the earliest recorded code of ethics for a helping profession, in this case medicine. We include it here to help us realize that the challenges of professional boundaries are not new and that these early provisions began to address the issues of power and vulnerability.

Hippocrates addresses sexual boundaries because sexual boundary violations were an issue. He is clear about why he goes to someone’s house (“benefit of the sick”), his responsibility to do no harm (“remain free of all intentional injustice”) and avoid sex with anyone

regardless of gender or status. Inherent in this provision is an understanding of the vulnerability not only of the patient he is there to see but also members of the patient's household. He is not entitled to sexual access to them.

Next refer participants to p. 10 of their Course Workbooks to compare the modern version of the Hippocratic Oath with the specificity of the 2012 Code of Ethics for the American Association of Pastoral Counselors.

Activity 5—Exercise: Boundary Crossing vs. Boundary Violation—15 minutes

Refer participants to p. 11 of their Course Workbooks. Each person should complete their lists of activities individually. Then in the large group discuss: What is the difference?

This exercise is to help participants consider that boundary crossings are necessary and inevitable aspects of ministry and teaching but are to be distinguished from boundary violations. The qualitative difference is harm. In the exercise, we are looking for boundary crossing examples such as calling someone on the phone, sending an email, stopping by for a visit, shaking hands, etc. Boundary violations would be "sexting," sexual harassment by phone, stalking, unwanted touch, etc. Use the information in "Commentary on Boundary Crossing vs. Boundary Violation" to help participants distinguish between the two.

Activity 6—Exercise: Self-Evaluation—15 minutes

Refer participants to p. 13 in the Course Workbooks. Each person should read and reflect on these questions individually. Then in the large group discuss: What did you learn from this reflection?

During discussion, help participants to critically evaluate some emotional boundaries in areas that they might not ordinarily consider problematic. The Self-Evaluation is intended to be provocative and to focus on the question: whose needs am I meeting? Refer to "Commentary on Self-Evaluation" on p. 14 of the participant's Course Workbook for more information.

Optional Activity—Read and reflect on the article, "This Is Not About You" pp. 71-76.

THEOLOGY AND BOUNDARIES

Learning Objectives

As a result of this session, participants will be able to

- Consider creation theology and the natural order as they inform our experiences of boundaries and freedom
- Reflect on the metaphor of shepherd and sheep as it relates to our understanding of roles of leadership in a spiritual community

Session Scheduling Information

(Adapt to fit your time frame.)

Activity 1—15 minutes

Activity 2—25 minutes

Activity 3—15 minutes

Total—55 minutes

We have chosen these two theological themes to help us reflect on the importance of boundaries and our roles as spiritual leaders. There are certainly others in our various traditions that can be used here.

Goal

To ground our understanding of healthy boundaries within the teachings of our faith traditions.

Our sacred texts and theology are rich sources of information and support as we deepen our awareness of the importance of healthy boundaries.

Activity 1—Discussion: Creation Theology—15 minutes

In creation theology, we are looking to our experience of the natural world as a source of knowledge and insight. Use this section to encourage participants to affirm the value of boundaries and live into the paradox of freedom and bounds.

Refer participants to “God Marked a Line and Told the Sea” on p. 15 in their Course Workbooks. Read aloud in the large group. When reading, find ways to share the reading (e.g. one half of the room reads verses 1 and 3, the other half reads verses 2 and 4, and everyone reads verse 5.) After reading ask participants to discuss the questions in small groups: How does creation theology help us understand the nature of boundaries? How do you relate to this paradox of freedom and bounds? After 10 minutes, return to the large group for final thoughts.

Refer to p. 16 of the participant’s Course Workbook, “Commentary on Theology and the Nature of Boundaries” for more information.

Activity 2—Discussion: The False Shepherds—25 minutes

Refer participants to p. 17 in their Course Workbooks. Read aloud verses from Ezekiel 34 and then discuss the questions on p. 18 of the Course Workbooks in small groups. After 15 minutes each group should report back to large group.

- What are the characteristics of a false shepherd?
- What is the judgment that the prophet Ezekiel delivers on them?
- According to Ezekiel, who is speaking for God, what is the nature of the sin here?
- What is the outcome for the sheep? What is the outcome for the shepherds?

Hints for discussion: In this passage from Ezekiel about the false shepherds, we hear the prophet calling out the shepherds (the leaders) as those who are exploiting the sheep rather than protecting and supporting them. The judgment is harsh: these false shepherds will lose their flocks; they can no longer be shepherds. The nature of the sin is exploitation and abuse of those who are vulnerable. God rescues the sheep from the false shepherds and assures them that God will now be their shepherd. The sheep are safe. The false shepherds are unemployed.

Activity 3—Discussion: The True Shepherds—15 minutes

Refer participants to p. 19 of their Course Workbooks and read aloud the passages from John 10 and then discuss in either small group or large group.

- What are the characteristics of a true shepherd?
- What is the meaning of trust in the relationship between sheep and shepherd?
- How do you relate to the metaphor of sheep and shepherd in your ministry?

Hints for discussion: The true shepherds are contrasted with the False Shepherds. In John's Gospel, Jesus also employs the shepherd/sheep metaphor. The true shepherd enters by the gate (has boundaries) and is known and trusted by the sheep. This trust has grown over time: the sheep know their shepherd and count on him. They do not trust strangers and will not follow them. Jesus also contrasts the false shepherds as those who are thieves and bandits and come to steal, kill and destroy. Rather he offers another way, a trustworthy way "that they may have life."

Refer to "Commentary on What the Sheep Teach Us" on pp. 20-21 of participant's Course Workbook for more information.

POWER AND VULNERABILITY

Learning Objectives

As a result of this session, participants will be able to


- Address their ambivalence about having power in our ministerial or teaching roles
- Acknowledge that they do have resources, power and authority
- Address their understanding of power and powerlessness
- Clarify the difference between being vulnerable and being at risk to violate boundaries
- Consider how they use power and what responsibilities it carries
- Compare the Hospitality Code with notions about entitlement


Session Scheduling Information

(Adapt to fit your time frame.)

Activity 1—10 minutes

Activity 2—20 minutes

 Activity 3—20 minutes

 Activity 4—25 minutes

Activity 5—5 minutes

Activity 6—10 minutes

Activity 7—20 minutes

Total —110 minutes

Optional Activity—45 minutes

Goal

To review our understanding of the realities of power and vulnerability that are fundamental to addressing healthy boundaries within our ministerial and teaching roles.

Most of us live with ambivalence about the power and authority of our roles as faith leaders. Some of us don't feel we really have power as a faith leader; others of us say that we don't want power as a faith leader. But we all experience power and vulnerability. So it is helpful to review our thinking on these issues.

Activity 1—Discussion: Power and Authority—10 minutes

Refer participants to p. 23 in their Course Workbooks. Read aloud the excerpt from Atwood's *Robber Bride* and the paraphrase that follows. Discuss in the large group: Do you agree or disagree with Atwood's idea of power? Why?

This passage from Margaret Atwood gives us an opportunity, through the eyes of another professional (a professor), to experience the demands and expectations of those whom we

serve and our response of wishing we could deny the power we have in relation to them. It takes us beyond believing “I’m just a human being” to acknowledging “[I’m] a human being with power.” The paraphrase pushes us to make it real in our context as ministers and spiritual teachers. Encourage participants to engage with their ambivalence about having power while helping them to acknowledge that they do. Use the “Commentary on Power and Authority” on p. 24 of the participant’s Course Workbook to clarify the fact of unequal power in the pastoral relationship and the implications and fiduciary responsibility that result from this fact. Be sure to pursue this implication with participants.

Activity 2—Exercise: Resources, Power and Authority—20 minutes

Refer participants to p. 25 in their Course Workbooks. This exercise asks participants to list the resources that they bring to their roles. Here we are looking for tangibles and intangibles: education and training, experience, expertise and knowledge, time, public platform like preaching, designated leadership role (Reverend, Doctor, Roshi, Rabbi, etc.), credentials with denomination or professional organization, access to congregants/students (e.g. the ability to initiate contact without a request), representation of the divine/spiritual, etc. Those of us in ministry or teaching don’t generally think consciously in terms of power, resources and authority. So sometimes it is difficult for us to see ourselves clearly in this regard. After completing their list, refer participants to small groups to discuss: Did you discover resources you did not know you had? What does this tell you about your responsibilities as a minister or spiritual teacher? Participants can then consider the implications of realizing the abundance of resources they have, i.e. power and authority.

Activity 3—DVD and Discussion: Understanding Power and Vulnerability—20 minutes

View DVD Excerpt #3 “Power” from your *Teaching Excerpts* DVD. This excerpt helps us understand the nature of power as a neutral concept and reinforce the reality of power and resources that ministers and spiritual teachers possess. Refer participants to p. 27 of their Course Workbooks.



DVD Excerpt #3—“Power” (1 min.):

“The concept of power is not a negative word. It’s like fire. You can either use it to cook a meal or burn a house down. And so the same sense is power because power is simply influence and the ability to influence others. And very definitely ministers have power.”

– Evangelist Jimmy Hurd, Church of Christ

“I think that we don’t really understand the nature of the power that we have in the lives of people that are our congregants. I think we often feel powerless, in fact, as clergypersons. In fact, in some cases we may feel vulnerable in relationship to the people that come to us.”

– Pastor Jim Rismiller, Lutheran Church (ELCA)

“Being powerful or having power is not about feelings. It’s about resources; and either we have resources or we don’t have resources. But what they’re reflecting I think is

very real and it has to do with not feeling in control. And that is a very real feeling in ministry, for better or for worse.”

– Rev. Dr. Marie M. Fortune, FaithTrust Institute

Discuss first question in large group: Do you agree that “power” is a neutral concept? Why or why not? Discuss second question in small groups: Think of a time when you “felt” powerless in ministry. In reviewing that situation, did you have resources whether you utilized them or not? Then report back to the large group.

Use the “Commentary on Understanding Power and Vulnerability” on p. 28 of the participant's Course Workbook. Emphasize the relativity of power and vulnerability in each of our lives and the importance of our task as spiritual leaders to empower those who may be vulnerable at this moment in their lives, to support them in accessing resources which lessen their vulnerabilities.

Activity 4—Exercise: Vulnerable or At Risk to Violate Boundaries?—25 minutes

Refer participants to the exercise on p. 29 of their Course Workbooks. Ask participants to discuss these situations in a small group, determining whether they as the faith leader would be vulnerable or at risk to violate boundaries. After 10 minutes, return to the large group for discussion.

This discussion of being vulnerable or at risk to violate boundaries can take us deeper in our self-awareness in clarifying the difference. We may casually use the term “feeling vulnerable” to describe any time we are uncomfortable, confused or anxious. This does not mean that we lack resources to deal with the situation. In those circumstances, we are at greater risk to violate boundaries because we are in a position of relative power and we are confused or don't know what we are doing. But we are still in the position to maintain clear boundaries.

When we are truly vulnerable it means that we lack sufficient resources to deal with a situation and our boundaries may be violated, resulting in harm to us. This exercise is an opportunity to sort out the difference. In the examples, #1 & #4 are at risk situations; #2 & #3 are vulnerable situations. You can ask participants to suggest other examples. Be careful to analyze their examples closely for at risk/vulnerability dynamics.

The goal of this exercise is to help participants distinguish between situations where they are not victims (but may be playing the victim) from situations where they may actually be victimized. Use the “Commentary on Sexual Harassment in the Workplace of a Faith Community” on p. 30 of the participant's Course Workbook to acknowledge that sexual harassment and bullying of clergy and spiritual teachers by congregants/students is a very real and serious problem and probably more widespread than we realize. Because of this, it is important to acknowledge this experience of sexual harassment in order to create space for victims to seek help and to not blame themselves, as the spiritual leader, for “not maintaining the boundaries.”

Conclude this exercise by viewing the DVD Excerpt #4 “Risk” from your *Teaching Excerpts* DVD.



DVD Excerpt #4—“Risk” (2 min. 35 sec.):

“I think it’s true that women don’t necessarily have the same amount of power as male clergy. Especially if they are in an assistant position; especially if they are younger. But all clergy inherently have power and as soon as we start to pretend that we don’t have any power we get into trouble. In the right places at the right times, I have plenty of power. I have been in counseling relationships where this person I am counseling may be older than me, may be more wealthy than I—all sorts of ways in society that person has more power. But in the counseling relationship I am the powerful one and I know that because they have opened themselves up to me and become vulnerable and I can help them or hurt them.”

– Rabbi Julie Schwartz, Reform Judaism

“For many of us when we went into ministry, we did so because we wanted to change the way in which ministry had been done and the ways we had experienced ministry. And we thought it was about power over other people being misused and so forth, and so the answer to that was to not have that power, and to basically say that we’re all in this together, and we’re all equals. And I think that was naive. I think that it denies the reality of the role, which is a role where we can bring a positive resource, a positive use of power. But if we’re coming from a place of ‘I don’t want to have power’ that we have anyway, we really don’t have a choice about that. It comes with the territory.”

– Rev. Dr. Marie M. Fortune, FaithTrust Institute

“Any interaction we have with someone is risky. That’s why we need to know what we’re doing and be thoughtful and careful in the way in which we go about it and the circumstance that we create. A colleague of mine once was called by a congregant to come visit him at home, and she went, and when she got there, he sexually assaulted her. He was bigger than she was, he was stronger than she was. There was no question of boundary crossing; we’re talking about criminal assault. So those kinds of things can happen for the person in the ministerial role, but by and large, under normal circumstances, we’re the ones that are in the position to be clear about what the limits of those boundaries are.”

– Rev. Dr. Marie M. Fortune, FaithTrust Institute

Activity 5—Discussion: Driver and Pedestrian—How We Use Power—5 minutes

Refer participants to the pictures on p. 31 of their Course Workbooks. The Driver/Pedestrian example here is a simple and familiar way to reinforce the difference between being vulnerable and at risk to do harm which in this circumstance is clearly a function of the imbalance of power. As long as we follow the rules and pay attention, nobody gets hurt and we proceed to wherever we are going. Discuss the questions in the large group: Who has the right of way? Why? Who is vulnerable? Who is at risk to do harm?

Activity 6—Discussion: Concept of Power and Rules of the Sea—10 minutes

Refer participants to p. 32 of their Course Workbooks. The Rules of the Sea example is a little more complicated than the Driver and Pedestrian example but makes the same point. Fewer participants will be familiar with navigation but those who are can help in this discussion. The important point here is the language that the Rules of the Sea use which suggests a moral obligation for the powerboat in relation to the sailboat. Help participants understand that in leadership roles, we are most often powerboats in relation to sailboats, canoes, kayaks, and swimmers! Discuss “burden” vs. “privilege”. Refer to the “Commentary on Rules of the Sea” on p. 32 of the participant's Course Workbook for more information.

Activity 7—Discussion: Hospitality and Entitlement—20 minutes

Refer participants to p. 33 of their Course Workbooks and read aloud the Hospitality Code. Discuss in the large group the questions: Describe a time in your life that you were vulnerable. What do these teachings from Judaism teach us about power and vulnerability?

The Hospitality Code takes the concept of power and vulnerability one step further and places it in the context of an important teaching from Hebrew scripture. It reminds us that God stands with the vulnerable, those with fewer resources and instructs us to do the same. The rationale behind this instruction is that we “were slaves in Egypt.” We have been vulnerable and will be again. This is sometimes a difficult concept to grasp for participants whose social location has meant that they have had sufficient resources to manage their lives. In addition, none of us likes to acknowledge being vulnerable so there is sometimes resistance to this discussion. The discussion questions for this section are designed to get at this hesitation: “I was vulnerable when I was a young child lost in a store; when I was traveling in a country where I didn’t speak the language; when my car broke down on the freeway late at night.”

Continue on p. 33 of the participant’s Course Workbook for the section On Entitlement. Read aloud the passage from the Wisdom of Solomon and then discuss in the large group the question: How does this passage from the Wisdom of Solomon contrast with the Hospitality Code?

The passage from the Wisdom of Solomon stands in stark, unapologetic contrast to the Hospitality Code and describes the essence of entitlement. This is the life of the “haves,” the speedboats, with the conclusion that therefore, we can oppress the poor or the widow or the old because they are “useless.” Solomon is articulating the rationalization that the powerful tell themselves when they “reason unsoundly.” Any of us can reason unsoundly in this way and begin to justify to ourselves and others our entitlement to material rewards and status. Refer to p. 34 in the participant’s Course Workbook for the “Commentary on Hospitality and Entitlement” and additional teaching points on power, vulnerability, hospitality and entitlement.

Optional Activity—DVD and Discussion: Use of Power to Exploit or Protect—45 minutes

View DVD Excerpt #5 “Part 1: Daniels and Roy” and DVD Excerpt #6 “Part 2: Daniels and Roy” from your *Teaching Excerpts* DVD which portray a youth minister first as a predator and then as a protector. These scenes help us to go deeper into how we can use our power as ministers or teachers to either exploit or protect. If time allows for this optional activity, it is useful to see the difference and also to be reminded of what harm a predator can do.



DVD Excerpt #5—“Part 1: Daniels and Roy” (5 min. 14 sec.):

Daniels as predator: Help participants identify Daniels’ resources of age, role, physical presence, etc. and Roy’s vulnerabilities of age, role, physical presence, recent loss of his father, teenage confusion, etc. List grooming behaviors such as Daniels’ self-disclosure of his personal issues, arranging time alone, alcohol, pornography, etc. Recognize the ways that Roy felt betrayed and violated by Daniels.

Refer participants to p. 35 of their Course Workbooks. Discuss in the large group the questions: What sources of power did Mr. Daniels possess? What made Roy particularly vulnerable? How did Daniels groom Roy? What was the impact on Roy as he reflected later in his life?



DVD Excerpt #6—“Part 2: Daniels and Roy” (4 min. 32 sec.):

Daniels as protector: Daniels was clear about his role as youth minister in Roy’s life. He kept an open door but didn’t pursue Roy. He inquired about Roy’s mom and asked to be remembered to her which encourages transparency. Roy felt safe and respected; he was able to get the support he needed over time from his youth minister.

Continue on p. 35 of the participant’s Course Workbooks. Discuss in the large group the questions: How did Daniels use his power to protect and support Roy? What was the impact on Roy?

LIVING WITH HEALTHY BOUNDARIES

Overview

We began with promoting an acknowledgement and appreciation of healthy boundaries in ministerial and teaching relationships. Now we move to application. What does it look like to apply our self-awareness of the importance of good boundaries in our ministries and teaching? How do we bring the lens of healthy boundaries to the everyday struggles of ministry and teaching?

The circumstances of our work present us with situations that are complex and challenging and grow more so every day. Emerging issues like internet technology and social media are unavoidable. Some areas of ministry or teaching like finance may be something we don't think much about and never think about in terms of healthy boundaries. The age-old dilemmas of sexual attraction to congregants or students may confront us when we least expect it. Our efforts to maintain good self-care practices are often a struggle. These are the areas where we have heard from colleagues that there is a need for deeper study and reflection.

This portion of *Healthy Boundaries 201* is divided into separate modules. Each module covers a particular emerging issue or concern.

- Boundaries and Internet Technology
- Boundaries and Social Media
- Boundaries and Finance
- Boundaries and Sexual Attraction
- Self-Care

As the teacher and facilitator of this material, you can choose which modules to use in a training workshop based on time and priorities. All of the modules are covered in the Participant's Course Workbook so even if you don't include all modules in your training session, participants will have access to the material.

Module Session Scheduling Information

Internet Technology—60 minutes

Social Media—90 minutes

Finance—35 minutes

Sexual Attraction—50 minutes

Self-Care—55 minutes

LIVING WITH HEALTHY BOUNDARIES

Boundaries and Internet Technology

Learning Objectives

As a result of this session, participants will be able to

- Consider boundary issues in use of the internet
- Gain critical skills in their use of the internet
- Evaluate their use of the internet in terms of time and purpose
- Consider potential areas of risk in internet use for their personal and professional lives
- Gain support for healthy boundaries and internet use

Session Scheduling Information

Activity 1—15 minutes

Activity 2—15 minutes

Lecture—10 minutes

Activity 3—20 minutes

Total—60 minutes

Goal

To address the challenges of the internet as it can enhance or undermine healthy boundaries in our ministries and teaching.

Internet technology is a remarkable tool that is increasingly accessible to more and more people. It gives us access to each other and to more information than we could ever have imagined. How can we think critically and bring our healthy boundary lens to our choices about how we use this tool?

The internet is itself a wide open field of boundless possibilities and few boundaries. It can be exciting and scary at the same time. The vast majority of the population in the U.S. and Canada now has internet access. It is a ubiquitous part of most of our lives whether we like it or not.

Activity 1—Discussion: Benefits and Risks—15 minutes

Ask participants by a show of hands to identify the devices they use every day to access the internet (e.g. smart phones, personal computers and tablets, mp3 players, public/work computers, etc.).

Ask participants to brainstorm the benefits of internet technology both personal and professional. List their answers on newsprint to post in training room.

- Communication/evangelism
- Social networking
- Access to information/research/study
- Connection with others with common concerns
- Shopping/banking
- Entertainment/recreation

Ask participants to brainstorm the potential risks of internet technology. List their answers on newsprint to post in training room.

- Create confusion among members through miscommunication
- Create unrealistic expectations of access to you as a faith leader
- Complicate dual relationships
- Replace face-to-face interaction
- Become addictive
- Distract from other tasks

Activity 2—Exercise: Self-Assessment—15 minutes

Refer participants to p. 37 of their Course Workbooks. This exercise should be done individually and then ask participants to share what they learned with the large group. It gives each participant a chance to stop and think about their use of time on the internet (to quantify their activity) without judgment and then to reflect on the impact of that activity both personally and professionally (quality of life questions). The Self-Assessment is meant to help participants think critically about the ways that internet technology can create problems with healthy boundaries.

Lecture—When Ministry/Teaching Meets Technology—10 minutes

Suggested lecture outline:

- I. When ministry and teaching meet technology, how do we
 - A. Maintain the integrity of the ministerial relationship?
 - B. Always recognize the reality of power and vulnerability present?
 - C. Make choices that sustain healthy boundaries?

II. Areas of concern

- A. Overuse, pornography, infidelity and risky behaviors are among the most frequently treated Internet-related problems by mental health professionals. (Research by Mitchell, 2005, cited on The Kinsey Institute website, www.kinsey-institute.org)
- B. Internet usage poses the risk of addiction and compulsivity because of “Triple A Engine”
- a. Accessibility
 - b. Affordability
 - c. Anonymity
- (“Online Sexual Compulsivity,” Alvin Cooper, Dana Putnam, Lynn Planchon, Sylvain Boies, in *Sexual Addiction and Compulsivity: The Journal of Treatment and Prevention*, Vol. 6, Issue 2, 1999.)
- C. “Online sexual compulsivity is very difficult to self-treat. Individual, couple, and/or group therapy is strongly recommended. Further, some psychologists suggest that successful treatment and recovery cannot be achieved simply by value-based arguments or ethical persuasion. That’s because in most cases, the person engaging in online sexual compulsivity has already experienced a disconnect between values and behavior.” (Tino, Millspaugh, and Stuart, *Our Whole Lives*, U.U.A., Boston, MA, 2008)
- D. If you are experiencing “a disconnect between your values and your behavior,” seek help from a therapist.

III. Examples of boundary violations using technology:

- A. Pastor Bob is using the church computer to access internet pornography because his wife won’t let him do it at home anymore. He is charging the fees to the church credit card.
- B. Sexting: in 2011, Congressman Anthony Weiner finally acknowledged that he had been sending sexually explicit photos and messages to six women. “This was just me doing a dumb thing, doing it repeatedly and then lying about it.”
- C. Rabbi Naomi is spending the majority of her day online and missing important synagogue meetings.

Activity 3—Discussion: Tips for Healthy Internet Usage—20 minutes

Refer participants to p. 37 in their Course Workbooks. Ask them to review and discuss in small groups. Return to large group and ask if there are other suggestions for tips.

Note: Internet pornography (cyberporn) is a critical concern for us as ministers and teachers. The discussion of internet pornography is included on p. 38 of the participant's Course Workbook to highlight how one denomination is addressing the issue with an emphasis on the use of church computers to access pornography as a chargeable offense for United Methodist clergy.

We do not pursue an in-depth discussion of internet pornography because it requires a discussion of healthy sexuality which is beyond the scope of this healthy boundaries training.

LIVING WITH HEALTHY BOUNDARIES

Boundaries and Social Media

Learning Objectives

As a result of this session, participants will be able to

- Consider boundary issues in use of social media
- Gain critical skills in their use of social media
- Evaluate their use of social media with a concern for purpose and intended outcome
- Consider potential areas of risk related to use of social media
- Gain support for healthy boundaries and social media

Session Scheduling Information

Activity 1—15 minutes

Activity 2—30 minutes

Activity 3—45 minutes

Total—90 minutes

Optional Activity—20 minutes

Goal

To consider the benefits *and* risks of social media in order to make choices in its use that will enhance ministry and teaching and maintain the integrity of relationships.

Social media is an exciting and attractive tool for communication and social networking with great potential for ministry and teaching. It also represents numerous land mines that can lead to boundary violations and often unintended negative consequences if we are not intentional about how we use it. How can we think critically and bring our healthy boundary lens to our choices about how we use this tool?

Activity 1—Discussion: Social Media Challenges—15 minutes

In presenting on these issues, first affirm that social media have great potential value in our work as ministers and spiritual teachers. Social media are all about boundary crossings now magnified and multiplied by the accessibility of the technology. Social media enable people to connect in creative, interesting and useful ways. But our experience is that many ministers and teachers have waded into using social media without stopping to consider boundary issues. Our concern in this section is to help participants step back and evaluate their use of social media in light of boundary issues.

Ask how many participants currently use or manage: Facebook, LinkedIn, Twitter, Email, website, blog, etc?

In the large group, ask participants to share the boundary challenges they have experienced or would anticipate in using social media in ministry or teaching.

The goal of the group discussion is for participants to share their experiences of situations where they have stumbled into an awkward or challenging circumstance with a congregant or student using social media and had an “oops” experience. For example, a pastor posted a comment on what he thought was his personal page but was actually his professional page: “My sermon isn’t really very good this week. But I’m not going to keep working on it.” A number of church members saw the post. “Oops.”

Optional Activity—Discussion: Benefits and Risks—20 minutes

If you have time, this activity encourages participants to articulate the positive and negative aspects of multiple forms of social media. This conversation affirms that social media are valuable tools and can also be problematic. We do not intend to convey a message that all social media is bad and should not be used.

This activity is optional here because it is not an essential conversation although it is useful. Moving from Activity 1 “Social Media Challenges” to Activity 2 “Do You Want to Use Social Media?” also works fine without the optional discussion.

In the large group, ask participants to brainstorm benefits and risks under each of these forms of social media. List their answers on newsprint to post in training room.

Email

- enhances my communication with congregants and colleagues
- saves time and effort
- avoids phone-tag
- not everyone has access
- written communication can be misinterpreted creating unnecessary problems

Twitter

- instant communication but for what purpose?
- limited space = limited communication which can be misinterpreted
- public communication: transparency?
- can be invasive

Website and blog

- good “advertising” for congregation or sangha
- good for recruitment or evangelism
- platform for ideas
- public and transparent

Facebook

- easy way to keep congregants/students informed about upcoming events and common concerns
- ability to connect or stay connected to many people in many places
- organized pages, groups, etc. for specific interests and purposes
- easy to violate boundaries with mixing of personal and professional information

Activity 2—Discussion: Do You Want to Use Social Media?—30 minutes

In considering the use of various social media, these are important questions to ask. Ask participants to form small groups and discuss the flowchart found on p. 39 of their Course Workbooks. After 15 minutes ask them to return to the large group and report back on their small group discussion.

Activity 3—Exercise: Social Media Scenarios—45 minutes

Ask participants to form small groups. Divide the room into four sections and assign each section one of the four scenarios listed on p. 41 of their Course Workbooks. Give them 15-20 minutes to discuss. Return to the large group and debrief together.

There are two goals for this exercise. First, to invite participants to engage with some specific boundary questions related to social media; second, to work together in a peer support group to encourage this model of accountability for each of them. Ideally a monthly meeting with clergy or teaching peers is the place to wrestle with questions about our choices in using social media or any other boundary challenge we may be experiencing.

To conclude the session, refer participants to article “Faith Community Considerations: Social Networking” (Daniels and Fortune) pp. 43-45 and also “Social Networking and Healthy Boundaries in Ministry: Asking Critical Questions” (Daniels and Fortune) pp. 65-68.

For an example of policy and guidelines see United Church of Christ Connecticut Conference www.ctucc.org/resources/onlinesafetyguidelines

LIVING WITH HEALTHY BOUNDARIES

Boundaries and Finances

Learning Objectives

As a result of this session, participants will be able to

- Consider financial management in a congregation or sangha as an area of boundary issues
- Be aware of possible “red flags”
- Discern principles and guidelines to help avoid financial boundary violations

Session Scheduling Information

Lecture—15 minutes
Activity 1—20 minutes
Total—35 minutes

Goal

To raise awareness about the potential for financial boundary violations and how to prevent them.

The handling of finances in a congregation or sangha is an area very susceptible to boundary violations. Whether it is the predator that sets out to embezzle funds or the wanderer who is sloppy and careless, the misuse of funds betrays the trust of the members. Financial boundary violations often correlate with sexual boundary violations. This is an area where careful precautions can prevent violations from occurring.

Probably most ministers or spiritual teachers don't think about finances as a potential boundary issue. Yet the possibility of mismanagement or carelessness is huge and the consequences for a faith community can be devastating. To a greater or lesser degree, a minister or spiritual teacher will have access to the funds of a congregation or sangha. It is important that a faith leader have this access for legitimate expenses or charity for individuals in need. But the basic management and accountability principles for any non-profit organization should apply. Common sense checks and balances can help insure proper management of funds.

The correlation of sexual boundary violations and financial boundary violations in faith communities which we have discovered over the years is unexpected but not surprising. A predator assumes entitlement to the people and the resources of a faith community. A wanderer will be careless about all boundaries in a faith community. Either way, the harm is frequently magnified by multiple boundary violations.

Lecture—Context and Consequences—15 minutes

Suggested lecture outline:

- I. Problems are created by:
 - A. Carelessness
 - B. Misuse of funds
 - C. Embezzlement

- II. Consequences for congregations:
 - A. Betrayal of trust
 - B. Liability
 - C. Criminal proceedings

- III. Be aware:
 - A. Sexual boundary violations often correlate with financial boundary violations
 - B. Rationalizations that may reflect financial impropriety:
 1. “I am just borrowing it and will pay it back.”
 2. “They will never know the difference.”
 3. “It has been years since I had a raise.”
 4. “I need it more than some of these people need it.”

Activity 1—Discussion: Principles and Guidelines—20 minutes

Refer participants to p. 47 in Course Workbooks. Review Principles and Guidelines. Discuss in large group.

LIVING WITH HEALTHY BOUNDARIES

Boundaries and Sexual Attraction

Learning Objectives

As a result of this session, participants will be able to

- Find support in acknowledging sexual attraction to a congregant or student
- Increase awareness of the possibility of transference or counter transference
- Engage in critical thinking on these issues
- Discuss their feelings with a trusted colleague in order to maintain healthy boundaries

Session Scheduling Information



Activity 1—20 minutes



Activity 2—30 minutes

Total—50 minutes

Goal

To consider ways to address sexual attraction to congregants and students.

Most pastors and spiritual teachers experience sexual attraction to congregants or students at some point. We may also experience sexual advances from those with whom we work. Sexual feelings can create challenges to healthy boundaries. How do we deal with these feelings and maintain the integrity of our relationships?

Activity 1—DVD and Discussion: Awareness and Responsibility—20 minutes

View DVD Excerpt #7 “Sexual Energy” from your *Teaching Excerpts* DVD. The issues raised in this first excerpt include awareness of sexual attraction and what it may mean, transference issues, self-awareness leading to consultation, and a reminder that acting on these sexual feelings is an extended process of “yeses.” Seeing and hearing our colleagues in the DVD reflect on these issues gives participants an opportunity to consider their own responses to feeling sexual attraction. Refer participants to p. 49 in their Course Workbooks and in small groups discuss: Do you agree? Do you disagree? Why?



DVD Excerpt #7—“Sexual Energy” (2 min. 6 sec.):

“So the same with sexual energy. When sexual energy arises in a relationship, I think it’s saying, ‘Oh the boundaries are going down. Isn’t that interesting? I feel safe with this person.’”

– Jan Chozen Bays, Zen Buddhism

“Sexual intimacy is an expression of not just love, but it’s also an expression of openness and mutual vulnerability to one another. And that is not what’s going on in the professional relationship.”

– Kimberly Day Lewis, Baptist

“It might be nice to think that all of us are so enticing and good looking that people are just coming out of the woodwork for us. But I don’t really believe it’s about us at all. It’s about our role. It’s about wanting to get close to power. It’s about wanting to get close to this kind of God-source that people feel comes from a clergy person.”

– Rabbi Julie Schwartz, Reform Judaism

“Some might argue that being aware of sexual attraction is good. So to have the thought is something to celebrate and it means that you’re open to it, and therefore less likely to act on it. If you can recognize you’re having the thought then you can get someone to be in conversation with you about it. Versus the pastor who has no awareness of the attraction who lets the small boundary violations escalate until they’re finally falling into each other’s arms without having any thought.”

– Ruby Takushi, Psychologist

“By the time you make it to the bedroom and say that final ‘yes,’ you’ve said ‘yes’ one hundred and one unspoken ways along the way. You’ve said ‘yes’ to the intimacy; you’ve said ‘yes’ to the isolation; you’ve said ‘yes’ to the time of day; you’ve said ‘yes’ to the environment, the location, the type of place you’re going to meet; you’ve said ‘yes’ to some of the fantasies that start to creep up in your own mind; you’ve said ‘yes’ to ‘what if?’ So by the time you make it into that bedroom, it’s not an accident. It’s just a natural extension of a whole bunch of ‘yesses’ along the way.”

– Rev. Luis Carriere, Free Methodist Church

View DVD Excerpt #8 “Saying No” from your *Teaching Excerpts* DVD. The issues raised in this excerpt again emphasize self-awareness of sexual feelings paired with a reminder that the minister/spiritual teacher is in charge of maintaining these boundaries in the ministerial or teaching relationship. This lays the groundwork for the next exercise which focuses on seeking support to insure avoiding boundary violations. Refer participants to p. 50 in their Course Workbooks and in small groups discuss: Do you agree? Do you disagree? Why?



DVD Excerpt #8—“Saying No” (1 min. 53 sec.):

“And then she started to leave, and then got to the door and then turned around and came back to me, and just embraced me. All she meant by that – she was expressing the hope and the desire that our pastoral relationship was a healthy one. She didn’t mean anything other than that, I am convinced. What I had to attend to were my own attractions and my own feelings when this embrace occurred because I felt she was attractive and the embrace felt good.”

– Pastor Jim Rismiller, Lutheran Church (ELCA)

“The pastor always – that’s part of the power – that we always have the responsibility to say ‘no,’ to set the boundary. It is not up to the parishioner. It is our job.”

– Rev. Gail Crouch, United Church of Christ

“What I said is that I don’t want there to be a problem between us either because it’s important to me that I be your pastor. So that framed it for her sake, but also for my sake.”

– Pastor Jim Rismiller, Lutheran Church (ELCA)

Activity 2—DVD and Exercise: Sexual Attraction to Congregants and Students—30 minutes

View DVD Excerpt #9 “Part 1: Sam and Mary.” Excerpt Summary: Mary is new in town and visits Sam’s church. She is attracted to him immediately, and invites him over for a romantic dinner. Sam is also attracted to her and realizes he needs to talk with someone to help him sort out his feelings and be accountable for maintaining healthy boundaries.



DVD Excerpt #9—“Part 1: Sam and Mary” (2 min. 2 sec.):

Ask participants to form small groups and discuss for 15 minutes the exercise listed on p. 51 in their Course Workbooks: Sam comes to you as a trusted colleague, asking you to help him deal with his feelings for Mary and hers for him. What advice do you give him? How do you help him sort out this situation?

In asking participants to be the “trusted colleague” we allow them to step away from thinking about their issues with sexual attraction and instead help Sam. This gives them a little distance which hopefully helps them to be both critical and creative in giving the advice that they themselves would need in this situation.

View DVD Excerpt #10 “Part 2: Sam and Mary.” Excerpt Summary: We see Sam talking with a colleague and then clarifying boundaries with Mary.



DVD Excerpt #10—“Part 2: Sam and Mary” (2 min. 13 sec.):

Refer participants back to p. 51 in their Course Workbooks and with the large group, discuss: What are the benefits of talking with a colleague when we are dealing with feelings of attraction for a congregant or student? What else might Sam have done to protect the integrity of the relationship? What if Sam and Mary decided to pursue a peer relationship outside of their pastoral relationship? What would this look like?

We are reinforcing the importance of talking with someone about sexual attraction and avoiding isolation as well as encouraging participants to think of other things that Sam could have done. Finally we offer the opportunity for participants to discuss the possibility of a peer relationship outside of the pastoral or teaching relationship. What would it

look like? When would it never be appropriate to pursue? Emphasize that one should not attempt to pursue a peer relationship if there has been a prior significant counseling or teaching relationship, if there is a significant difference in power due to, for example, age or circumstance, or if the other person is in crisis or dealing with a significant life transition. In order to pursue a genuine peer relationship, both persons will have to step out of the pastor-congregant or teacher-student roles and meet those needs elsewhere. This should be done with openness and transparency in the community.

Refer to the “Commentary on Sexual Attraction to Congregants and Students” on p. 52 in the participant’s Course Workbook for additional reading and reflection.

LIVING WITH HEALTHY BOUNDARIES

Self-Care

Learning Objectives

As a result of this session, participants will be able to

- Pause to consider the expectations we carry using Moses' experience as a lens
- Revisit self-care activities and evaluate
- Review Self-Assessment as a check-in
- Reaffirm their commitment to intentional self-care

Session Scheduling Information



Activity 1—20 minutes

Activity 2—5 minutes

Activity 3—15 minutes

Activity 4—10 minutes

Activity 5—5 minutes

Total—55 minutes

Goal

To affirm the importance of self-care in reducing our risk of boundary violations with congregants and students.

Clergy and spiritual teachers tend to be busy people juggling multiple tasks and multiple expectations from their congregants and students. We are also easily tempted to believe that we are indispensable. The consequence can often be ignoring our needs and our health which then puts us at greater risk to make unwise choices and engage in conduct which may bring harm to someone.

Self-care doesn't come naturally, especially to busy ministers and teachers. It is something that we have to pay attention to if we are to insure that it doesn't come last on our priority list. It is abundantly clear that when we are not taking care of ourselves and meeting our personal needs we are much more likely to try to meet those needs inappropriately which usually means wandering behavior with congregants or students which can lead to boundary violations.

One of our greatest temptations is to begin to believe that we are the most important person in the room and that we are indispensable to the work of ministry or teaching. This never bodes well for self-care. In the Exodus passage that appears on p. 53 of the participant Course Workbook, we hear Moses' father-in-law cautioning Moses about trying to be all things to all people all the time.

Activity 1—Discussion: The Task of Self-Care—20 minutes

Refer participants to p. 53 in their Course Workbooks and discuss the passage and question in small groups. Allow 15 minutes and then ask participants to return to the large group for final thoughts.

Activity 2—Discussion: Challenges of Self-Care – 5 minutes

View DVD Excerpt #11 “Self-Care” from your *Teaching Excerpts* DVD. This excerpt includes comments that focus the discussion on the challenges of self-care. Invite participants to react to excerpt comments from the DVD.



DVD Excerpt #11—“Self-Care” (58 sec.):

“The amazing new invention, The Self Careburator, will give you all the benefits of being a good spouse, enjoying hobbies, eating right, and exercising, and more! All in less than five minutes a day! Perfect for the busy professional. Non-denominational, void where prohibited, results may vary.” (cartoon)

“The pastors that get themselves into trouble – it’s because they’re not taking care of themselves. The pastors who have a healthy family life, their intimate relationships, who play, who take time away, are less apt to get into trouble crossing boundaries.”
– Rev. Gail Crouch, United Church of Christ

“Self care is a discipline – a decision needs to be made every morning when one gets up for self-care for that day, in terms of exercise, appropriate eating and time for one-self. That’s not a once in a lifetime decision, that’s a daily decision.”
– Pastor Jim Rismiller, United Church of Christ

Activity 3—Exercise: Self-Care Inventory—15 minutes

Refer participants to pp. 55-56 to complete the inventory individually. Next ask the large group to suggest any additional self-care activities.

This exercise offers participants an opportunity to do a quick check-in to consider aspects of their lives that suggest they “have a life” outside of ministry or teaching, i.e. that they are actually engaged in activities outside of work that support their physical and emotional health.

Activity 4—Read, Reflect and Discussion: Necessity of Self-Care—10 minutes

After completing the Self-Care Inventory, refer participants to p. 56 of their Course Workbooks to reflect on the passages which describe the necessity of self-care. Ask the large group to discuss their thoughts. What does your faith tradition tell you about self-care?

Activity 5—Exercise: Self-Assessment Checklist—5 minutes

Refer participants to the Self-Assessment Checklist on pp. 57-58 and explain that it is to be used on their own outside of the training and preferably in consultation with a therapist or spiritual guide. It is not intended to be addressed by individuals in the training workshop. The questions are designed to help participants check-in on issues such as healing work around family history, psychosexual health, and personal/professional needs and expectations.

The intent of this Self-Care section is not to leave participants feeling inadequate in another area of their lives but to support self-awareness of their activities and encourage a recommitment to intentional self-care activities.

CLOSING REFLECTIONS

Goal

To conclude the session by remembering and affirming our grounding within our faith traditions and the privilege and responsibility we have in being called into leadership.

If we take our leadership roles seriously and desire to do least harm in our ministries and teaching, then we must pay attention to boundaries in relationships. At times this may seem cumbersome, self-conscious and tedious. But our hope is that as our self-awareness deepens, we begin to incorporate our attention to healthy boundaries into the way we do ministry or teach so that it becomes second nature. This closing material seeks to affirm, encourage and support participants as they prepare to return to their congregants and students.

Closing Activity— DVD and Discussion: Privilege and Responsibility – 5 minutes

This section of the participants Course Workbooks, pp. 59-62 offers three options listed below for closing the training.

- View DVD Excerpt #12 “Privilege” from your *Teaching Excerpts DVD*—(1 min. 30 sec.) Excerpt Summary: We see the minister or teacher’s commitment to creating safe space for congregants or students and an awareness that these leadership roles are a privilege.
- Read aloud “The Contract: A Word from the Led” on p. 60. This is a poem written in the voice of the congregant or student or anyone in the position of following the leadership of another. Use the poem and the discussion questions to deepen an understanding of the responsibility of leadership.
- For final words of encouragement, select a reading from the Readings for Reflection on p. 61 and refer participants to the “Commentary on Trusting Our Leaders” on p. 62.

SECTION THREE

PRAYERS AND MEDITATIONS

Nature of Boundaries

JEWISH TRADITION

Prayer/Meditation

The *Mishnah* teaches us the importance of boundaries. “Make a fence around the Torah,” we read in *Pirke Avot*. (Avot 1:1). Boundaries create helpful separations. They allow us to distinguish between what behavior is acceptable and what is not.

We gather together to learn about boundaries in our human relationships and how they relate to the privilege of leadership. May we open our hearts and our minds to this teaching. May we serve our people with compassion and with love, helping to bring healing and peace to our community and to the world.

Prayer/Meditation

Havdalah means separation. With the service of *Havdalah*, we conclude the Sabbath and transition into a new week. *Havdalah* reminds us of the importance of distinctions in time and in relationships. As teachers and leaders, may we remember the importance of such distinctions. In our efforts to honor and uphold appropriate boundaries, may we be blessed.

CHRISTIAN TRADITION

Prayer/Meditation

Psalm 119: 10-16

Before reading the passage, explain that the first part introduces the concept of boundaries which are limits on our behavior. Being human, we’re prone to rebel against limits which is, after all, at the heart of the creation narrative. But if we look at Psalm 119, we see that the poet spends most of it expressing gratitude for God’s commandments and principles. The poet delights in God’s boundaries.

Suggest that participants listen to the joy expressed in these verses. (Read the Passage.)

Our reasons for becoming spiritual leaders are many and complex. We sometimes forget, though, that one reason we decided to follow this path was because we delight in God’s word;

our preaching and teaching are grounded in its principles. As we begin to look at the issue of boundaries, let us be reminded of our love for God's commandments. Let us open our hearts and minds to the emancipation they offer. In verses 44 and 45 the psalmist says, "I will keep thy law continually, forever and ever; and I shall walk in liberty."

Prayer suggestion: Express gratitude and delight in God's commandments. Confess that like our forebears in the Garden, we resist boundaries and prohibitions. Petition for God to instill in us renewed delight in the commandments that we may walk in liberty.

Prayer/Meditation

Prayer suggestion: Thank God for the commandments and principles we've been given so that we might experience liberty in our work. Thank God for the opportunities that come with serving others and for the chance to be with them in their most intimate moments. Acknowledge that sometimes boundaries are not clear. We do not know whether to touch, whether to interfere, whether to use the power of our position. Confess that sometimes we pursue our own needs in our relationships with those we have promised to serve. Petition God for increased awareness and insight.

BUDDHIST TRADITION

Prayer/Meditation

READINGS from the *Dhammapada*:

The Mind: 3

"The mind is flighty and elusive, moving and alighting wherever it pleases. To tame the mind is wonderful, for a disciplined mind brings peace and true joy."

The Self: 2-9

"First establish in yourself what is proper, then you can instruct others. As you instruct others is how you should act. It is easy to do that which is harmful and not good. It is hard to do what is beneficial and good. One's self is difficult to control. Once controlled, then one can control others. When you are well trained you will find the best and rarest protection."

The Buddha: 5, 15

"Not to do evil, to do good, to purify one's mind—this is the teaching of the Buddhas. It is difficult to obtain human birth; it is difficult to live with the certainty of death; it is difficult to hear the precious Dharma; the appearance of an Awakened One is rarer still. It is hard to find a person of great wisdom. Such a person is not born everywhere. Wherever a wise one is born, the family thrives in happiness."

These verses tell of the joy to be found in the rare opportunity to live as a human being, to be able to hear the Dharma, and to undertake the discipline of training. It brings happiness and peace to all the families we are part of and care for.

The Buddha taught that the rules of discipline or precepts enable us to channel our passions and to turn our self-centered awareness outward to benefit others. Yet it is important to acknowledge that we all have our unexplored or shadow sides. Because we are teachers and expected to demonstrate ethical conduct, we may forget that we, too, have a need to explore the shadow sides. We can use the verses in the texts from the opening of this session and subsequent sessions as a springboard to examine parts of ourselves we have been unable to look at, and to undertake an authentic process of self-examination.

The Buddha's robe is patterned like a rice field, in which the activities of planting new shoots, cultivating, weeding, harvesting, and lying fallow all co-exist. Many forms of life depend upon the field: birds, insects, frogs, and creatures in the earth. The precepts are useful boundaries. They serve like the dikes around the rice field. The precepts channel our passions, protect the rich field of our interdependent life, and uphold the fundamental principle of non-harming (ahimsa).

The Buddha taught a code of discipline based upon the principle of non-harming, to both lay people and the ordained. He said that when we live a virtuous life, we are provided with inner strength and clarity.

Participants may wish to take or renew the basic precepts for the duration of the workshop or series of classes.

I vow not to kill but to cherish all life.

I vow not to lie but to tell the truth.

I vow not to misuse sexual energy but to be respectful of others' bodies and minds.

I vow not to take what is not given to me, but to protect the belongings of others.

I vow not to misuse drugs and alcohol, but to keep the mind clear.

Prayer/Meditation

Recite together the Metta Sutta.

This is what should be done

By one who is skilled in goodness,

And who knows the path of peace.

Let them be able and upright,

Straightforward and gentle in speech.

Humble and not conceited,

Contented and easily satisfied.

Unburdened with duties and frugal in their ways.

Peaceful and calm and wise and skillful

Not proud and demanding in nature.

Let them not do the slightest thing

That the wise would later reprove.

Wishing in gladness and safety,

May all beings be at ease.

Whatever living beings there may be,
Whether they are weak or strong, omitting none,
The great or the mighty, medium, short and small.
The seen and the unseen,
Those living near and far away,
Those born and to be born.
May all beings be at ease!

Let none deceive another,
Or despise any being in any state.
Let none through anger or ill will
Bring harm upon another.
Even as a mother protects with her life,
Her child, her only child,
So with a boundless heart,
Should one cherish all living beings.
Radiating kindness over the entire world,
Spreading upwards to the skies
And downward to the depths,
Outwards and unbounded
Free from hatred and ill will,

Whether standing or walking, seated or lying down
Freed from drowsiness,
One should sustain this recollection.
This is said to be the sublime abiding.
By not holding to fixed views,
The pure hearted one,
Having clarity of vision,
Being freed from all sense desires,
Is not born again into this world.

PRAYERS AND MEDITATIONS

Friendships and Dual Relationships

JEWISH TRADITION

Prayer/Meditation

“Get yourself a teacher,” the *Mishnah* instructs. In the same sentence, we are advised to “acquire a friend.” (Avot 1:6). Both are important. Yet the role and responsibilities of teacher are different from those of friend. What happens when we try to be both for another person? What complexities arise when we take on two different roles in our relationship with another human being, when we blur the boundaries of who we are as teacher and leader?

We gather together to learn about dual relationships and how they relate to the privilege of leadership. May we open our hearts and our minds to this teaching. May we serve our people with compassion and with love, helping to bring healing and peace to our community and to the world.

Prayer/Meditation

In the daily morning liturgy, we declare, “My God, the soul that You have given me is pure!” And yet, each day we are challenged with choices, many with outcomes whose complexity and results we cannot immediately know. As teachers and leaders, may we remember the importance of our choices and the complexity of many of their outcomes. In our efforts to make wise choices, may we be blessed.

CHRISTIAN TRADITION

Prayer/Meditation

Jeremiah 29:11-12

“For surely I know the plans I have for you, says the Lord, plans for your welfare and not for harm, to give you a future with hope. Then when you call upon me and come and pray to me, I will hear you.” (NRSV)

In Jeremiah God is speaking to those who have been exiled from Jerusalem to Babylon. In the passage, God is telling the exiles to make a home in Babylon, to settle in. Sometimes we too feel like exiles trying to make a home in a strange land. We know that to be happy we’ll need new friends. Maybe, if we’re single, we’ll want romance.

"I am looking out for your welfare," God assures the Israelites. "I have plans... to give you a future and a hope." What might these words mean for us? Because we were created to be in relationship with God and with each other, God's idea of our welfare certainly must include close ties with others. We can be fairly certain that for us God's words mean "I want you to have love; I want you to have friends." The question is: Where can we find them?

Prayer suggestion: Express trust that God is looking out for our welfare and wills us to have a future which no doubt includes love and friendship. Petition God to help us form relationships that do not compromise our work among God's people and that bring no harm to those we have been called to serve.

Prayer/Meditation

Prayer suggestion: Thank God for romance, friends, and gifts that come as expressions of appreciation and affection. Confess that we do not always make wise decisions about relationships, that in creating a small circle around us, we do not make the magnitude of God's vast circle of love and friendship evident. Ask that God guide us in the decisions we make, that our actions not bring more hurt to an already hurting world.

BUDDHIST TRADITION

Prayer/Meditation

Samyutta Nikaya I 3:18

"On one occasion the disciple Ananda said to the Buddha, 'Good friendship, good companionship is half of the holy life.' The Buddha said, 'Not so Ananda, this is the entire holy life, that is, good friendship, good companionship, good comradeship. When disciples have a good friend they will develop and cultivate the path and...become free from the suffering of illness, old age and death, and free from sorrow, lamentation, pain, displeasure and despair. They will develop all the factors of the Eightfold Path, right intention, right speech, right action, and so on, and eventually these will mature into the release of enlightenment.'"

Dhammapada, Happiness: 11, 12

"Keeping company with fools will give you nothing but grief. Fools are the worst of enemies—they keep you suffering forever. Keep company with the trustworthy—they will make you happy and will be like close family. Rely on those who are true human beings, wise, insightful, enduring, dutiful, and noble."

Dhammapada, The Wise: 1-2

"Associate yourself with a wise person, one who can point out your faults, like revealing hidden treasure. Good...will come from following such a person....Let them teach and direct you and turn you away from what is unwholesome."

Dhammapada, The Elephant: 9, 13

“If you can find a friend to go with you who is steady, careful and wise, together you can overcome all hardships with mindfulness and joy. But if you do not find a friend who behaves well and is wise to go with you, then proceed alone, like an elephant alone in his forest, or a king who leaves a conquered land behind. It is better to live alone, as there is no companionship with fools. It is pleasant to have companionship when the need arises. It is pleasant to be content. It is pleasant to have virtue at the time of death. It is pleasant to abandon all suffering. It is a delight to be close to your mother, and a delight to be close to your father. It is a delight to be a religious person, and a delight to be wise.”

These teachings from the Buddha emphasize the importance of good friends. He called good companions “the whole of the holy life.” There are several types of good friends, people who encourage, not hinder, our aspiration to awaken. The first is the Buddha himself, whose teachings provide support and companionship when we are assailed by doubt or temptation. The second are spiritual teachers, who model themselves upon the example of the Great Teacher. Third are the sangha, our fellow practitioners. Good companions encourage us in difficult times, point out our errors when we are not able to see them ourselves, and help us not to stray off the path.

This passage tells us that we who are spiritual leaders and teachers need a spiritual mentor of our own, someone to whom we are accountable, who monitors our spiritual and secular life and can call us on the carpet if and when needed. We also need friends who are peers. Because there are still relatively few Buddhist teachers in the West, particularly in a small town, we might find companionship among clergy who are not Buddhists.

The Buddha also emphasizes the importance of solitude. We need time away from all human voices and concerns. In solitude we can drop all “outflows” of speech and thought and become purely receptive. When we are quiet and unmoving down to our core, then wisdom beyond wisdom, the truth of the great mystery, is revealed. If we learn to be happy in solitude, in a situation in which no appropriate friends are available, still we are content.

The Buddha emphasized generosity as the highest virtue. He was very specific about how to practice generosity, saying that gifts should be given with careful attention to the need of the person and the appropriateness of the gift. He said that gifts should never be given with an expectation of something in return. The Buddha taught that having few desires and living simply were characteristics of awakened beings. He recommended giving the basic necessities of life through gifts of food, drink, clothing, shelter, transportation and light. Because karmic consequences occur through the action of receiving as well as giving a gift, spiritual teachers should be careful about both giving and receiving gifts.

Prayer/Meditation

Often the mind focuses upon what is lacking in our life. When our mind sees only scarcity we try to fill it with something, an activity, a material object or person.

Suggested meditation to antidote the mental habit pattern of concern with scarcity.

Please be comfortable in your seats. Focus your awareness on the flow of your breath. (Leader: Let a few breaths pass.) Become aware of what at this moment is given to you. Don't try to think about it with the mind, but simply reach out your awareness to what is being given freely to you just now...and just now.

Let about five or ten minutes go by with an occasional reminder, such as, "Bring your attention to whatever is being given to you at this moment. Rest in that awareness."

Ask participants to bring their awareness back to their individual body.

Ask for feedback. (Again, there is no *right answer*. Most people find that they become aware of all manner of things being given/flowing toward them, from air, warmth, sunshine, support of gravity, friendship, bird songs, to the beating of their heart and love. They often feel an upwelling of gratitude for all the things that are given, and sometimes have the clear realization that they are never alone, and have always been provided for.)

PRAYERS AND MEDITATIONS

Emerging Issues

JEWISH TRADITION

Prayer/Meditation

The Torah teaches that human beings are created *b'tzelem elohim*, with a spark of the divine in us. We read, "Then God created the human being in God's image; in the image of the divine, God created it. Male and female God created them." (Genesis 1:27) Human life is precious. Whoever destroys one life is regarded by the Torah as if he or she has destroyed a whole world and whoever saves one life is as one who has saved an entire world. (Mishnah Sanhedrin 37a)

May we open our hearts and our minds to this teaching. May we serve our people with compassion and with love, helping to bring healing and peace to our community and to the world.

Prayer/Meditation

The book of Kohelet in the Bible reminds us that "a season is set for every experience under heaven: a time for birth and a time for dying... a time for embracing and a time for shunning embraces." (Ecclesiastes 3:1-8) Kohelet reminds us of the importance of distinctions in time and that certain activities are appropriate at particular times but not in others. As teachers and leaders, may we remember the importance of such distinctions. In our efforts to honor and uphold such distinctions, may we be blessed.

CHRISTIAN TRADITION

Prayer/Meditation

Proverbs 25:28

"A [person] without self-control is like a city broken into and left without walls."

Picture an ancient city with crumbled walls. It is a vulnerable city, open to attack. There are no safe spaces.

Recent barrages of news about sex abuse in the religious community have resulted in the church being viewed in much the same way: as a crumbled institution, where there is no safe space. This perception is the result of spiritual leaders not exercising self-control.

Self-discipline, though, refers to more than sexual restraint. It includes being cautious not to exercise our power for personal gain, not permitting our egos to dictate our actions and interactions, and not merging who we are with who the other is.

As spiritual leaders we're called to keep the walls in good repair.

Prayer suggestion: Express gratitude for walls that provide safe places. Confess that sometimes, to satisfy our own ego needs, we chip away at the walls. We fail to practice self-discipline. Petition for new self-awareness and self-restraint, so that the church can be a safe and healing place.

Prayer/Meditation

Hebrews 12:11-13

"Now, discipline always seems painful rather than pleasant at the time, but later it yields the peaceful fruit of righteousness to those who have been trained by it. Therefore lift your drooping hands and strengthen your weak knees, and make straight paths for your feet, so that what is lame may not be put out of joint, but rather be healed."

Awareness and self-discipline are fundamental to healthy pastoral or teaching relationships. This is not about being politically correct or avoiding "mistakes." It is about keeping our eye on the integrity of the pastoral relationship "...so that what is lame may not be put out of joint, but rather be healed." We have and will make mistakes, crossing physical, emotional, or spiritual boundaries in ways that are not helpful to the other. But we must learn from these experiences, seek to mend any brokenness we may cause, and keep trying. The "fruits of righteousness" are then a healthy, healing, faithful community.

Prayer suggestions: Express gratitude for vocation. Confess that we do not always practice self-discipline in doing our job, that we make mistakes, and in making mistakes we jeopardize the well-being of others. Petition for strength in our weak knees and drooping hands, that our efforts may contribute to the sustaining of a healthy, healing, faithful community.

Prayer/Meditation

Prayer suggestion: Express gratitude for the opportunity to preach and the gifts of touch and sexuality. Confess that we often use our opportunities to build our own ego and satisfy our own needs. Ask for guidance in discerning when an action glorifies God and is in the best interests of our congregants.

BUDDHIST TRADITION

Prayer/Meditation

“There are five courses of speech...timely or untimely, true or untrue, gentle or harsh, connected with good or connected with harm, spoken with a mind of loving kindness or with inner hate.”
Majhima Nikaya 21:11

“The noble disciple...abstains from false speech, from divisive speech, from harsh speech, from frivolous and idle chatter.” Samyutta Nikaya IV:42:8

“Better than a thousand empty words is one beneficial word, hearing which, one becomes at peace.”
Dhammapada, Thousands: 1

The Buddha included Right Speech as one component of the Eightfold Path, that is, one of the eight most essential aspects of our practice. Speech is an agent of karma. It can be a potent tool for good, providing help and support to others. Or it can cause harm and discourage people from following their spiritual path and calling. The words of spiritual teachers, monks, and priests are given extra weight by students, and thus these leaders should be particularly mindful of the power of their speech and of their silence upon the welfare of others. The Buddha talks of abstaining from many kinds of unwholesome speech. Abstaining means to be aware of when NOT to speak and to remain silent. So important are silence and deep listening that the Buddha spoke of “Noble Silence.”

Prayer/Meditation

“Should any bhikkhu, overcome by lust, with altered mind, engage in bodily contact with a woman, or holding her hand, holding a lock of her hair, or caressing any of her limbs, it entails initial and subsequent meetings of the Community.” (The commentary details bodily contact to include “rubbing, rubbing up against, rubbing downwards, rubbing upwards, seizing, drawing toward, squeezing, grasping or touching.”) “Should any bhikkhu . . . address lewd words to a woman . . . alluding to sexual intercourse. . . should any bhikkhu . . . speak to a woman about ministering to his sensuality . . . it entails initial and subsequent meeting of the Community.” (Examples include a bhikkhu saying to a woman, “Sister, is that short hair yours?”)

Vinaya (code of conduct for the ordained)

The Buddha developed very specific rules of conduct for the persons that he trained and authorized to teach the Dharma (i.e., the bhikkhus and bhikkhunis). The rules became specific as cases of questionable behavior were brought before him and the council of elders. In America we do not have a centralized body to hear and adjudicate cases of alleged misconduct by Dharma teachers. As a result, students who feel that they have been victimized, as well as teachers accused of misconduct, have no place to turn to for help. When allegations arise, there may be many “initial and subsequent meetings of the sangha,” with outcomes that vary in their embodiment of wisdom and compassion. To avoid unnecessary suffering, it is

very important that each Dharma organization or association of sanghas develop and make available to their members ethical guidelines, policies, and procedures regarding allegations of teacher misconduct. Dharma teachers should insist on—and assist in—this vital sangha task.

The Buddha had questionable cases heard before the sangha. This is a helpful standard for us. We can ask, “Would I be comfortable having what I am doing or saying be known to everyone in my Dharma community?” It is also helpful to remember that Dharma teachers are viewed as professionals and will be held to professional standards of ethical behavior by courts. We can ask ourselves, “Would I be comfortable explaining to a judge and jury what I am saying and doing in this situation?”

Intimacy is a fundamental human need. Spiritual practice has been described as the process of becoming completely intimate with ourselves and all things. When we are truly intimate with ourselves, we do not look outside, to others, to fill our needs. (You might have people give examples of when they felt the deepest intimacy with someone.) The deepest intimacy does not involve physical touch, but occurs in the sharing of the quiet and tender places of mind and heart.

Prayer/Meditation

Suggested ten-minute meditation on intimacy with and gratitude toward the body, heart, and mind.

Please sit quietly and become aware of the movement of the breath. (Leader: Allow for three to five of your own breaths.) Beginning at the top of the head, move your awareness slowly down through the body. As your awareness enters a part of the body, silently say, “Thank you ____ for ____.” For example, as your attention turns to your hair, you become aware of its role in your life. You might say silently, “Thank you, hair, for covering my head in the rain.” (Leader: Allow about five minutes.)

Be sure to include your heart, both the physical heart and the feeling heart. (Leader: Allow about seven minutes.)

Be sure to include both your brain and your mind.

(At the end of ten minutes, ask people to come back into full awareness of the room. Allow a few minutes for sharing. Ask people what they discovered about their feelings toward their body, heart and mind. There are no right answers or experiences. Most people discover unexpected gratitude toward their body, heart and mind. Mention that when we are intimate and comfortable with our own selves, we need less from others. We are content either to be alone or to be in the company of others.)

PRAYERS AND MEDITATIONS

Self-Care

JEWISH TRADITION

Prayer/Meditation

We read in the Torah that Moses sat as magistrate among the people, while the people stood about Moses from morning until evening. After observing this situation, Moses' father-in-law Yitro, offered these words of helpful rebuke: "The thing you are doing is not right; you will surely wear yourself out and these people as well. For the task is too heavy for you; you cannot do it alone." (Exodus 18:13-18) Yitro then counsels Moses about the need to delegate responsibilities, provide for his own self-care, and avoid workaholism and burnout.

We gather together to learn about tending to our personal needs and the need for self-care as well as how this relates to the privilege of leadership. May we open our hearts and our minds to this teaching. May we serve our people with compassion and with love, helping to bring healing and peace to our community and to the world.

Prayer/Meditation

In the Torah we read, "The people of Israel shall keep the Sabbath, making the Sabbath an enduring covenant for generations to come." (Exodus 31:16) The Sabbath is a day of rest, reflection, and renewal.

The Sabbath is a moment in time set aside, set apart from our ordinary routines. Setting aside time to pause and renew ourselves is essential to our own personal self-care. As teachers and leaders, may we remember the importance of self-care and that our personal needs require tending. In our efforts to honor and care for ourselves, may we be blessed.

CHRISTIAN TRADITION

Prayer/Meditation

Proverbs 27:18a

"Anyone who tends a fig tree will eat its fruit . . ."

In the arid climate of the Middle East, fruit-bearing trees do not grow without being tended. (Read Proverbs text.) How often we forget that our bodies and minds require care. We ignore our needs. Often it's because we're convinced the pressures on us are too great; the amount of work to be done is endless. When we ignore our personal needs, our spirits shrivel. We cease to bear fruit.

Prayer/Meditation

Prayer suggestion: Acknowledge that our lives are like fig trees. They require nurturance. Confess that in the midst of job expectations, we sometimes forget to take care of the fig tree, that is, our own emotional and spiritual needs. Ask God's guidance in creating healthy relationships that meet our needs for love and affirmation.

Prayer/Meditation

Psalm 23: 1-3

"The Lord is my shepherd, I shall not want. He makes me lie down in green pastures; he leads me beside still waters; he restores my soul. He leads me in right paths for his name's sake."

The familiar twenty-third Psalm reminds us of the possibilities of restoration.

Prayer suggestion: Express gratitude for meaningful work and for the renewal that awaits us, if we only take the opportunity. Confess that we often become so immersed in our work that we fail to turn to the solitude and refreshment we need for the well-being of our spirits. As a result we sometimes seek nurture from those we are meant to serve. Request God's ongoing guidance that all present will find ways to tend to their spiritual and emotional needs.

BUDDHIST TRADITION

Prayer/Meditation

Our body, heart, and mind are the very tools for awakening. If we are to help others, we must care for ourselves.

READINGS From the *Dhammapada*:

Happiness: 5-7

"The victorious attract enemies; the defeated sleep in misery. When you give up both victory and defeat, you will rest in happiness and peace. There is no fire like desire, no offense like hatred, no suffering like this heap of flesh, no happiness higher than the peace of Nirvana. Hunger is the greatest affliction, samsara the greatest foe. When you truly understand this, you will pass from sorrow to the highest joy."

Happiness: 8

"Health is the greatest possession; contentment the greatest wealth. A loving friend is the best of kin, and the greatest joy is passing from sorrow."

The Self: 10

"For the sake of others' welfare, do not neglect your own welfare. Understand your highest purpose and turn toward it."

The Path: 10

“From meditation arises wisdom. Without meditation wisdom wanes. Knowing the two paths, gain and loss, conduct yourself so that wisdom increases.”

Happiness: 9

“Tasting the sweetness of solitude and savoring tranquility, you drink the nectar of Dharma, and become free from fear and from evil.”

Once we have found the spiritual path that transforms suffering into happiness, we naturally wish to share what we have found with others. As our clarity and breadth of mind increase, we become more acutely aware of the suffering of other beings, millions of beings. In our sincere desire to help them all, we are likely to deplete our own store of compassion and wisdom. The Buddha is clear that it is unskillful to neglect the health of our own body, heart, and mind in order to help others. He called health in body and mind the greatest wealth. If our work to help others out of unhappiness increases our own unhappiness, then suffering in the world is increased, not decreased.

Just as the Buddha rejected both self-indulgence and self-renunciation and embraced the middle way, so must we. Our body, heart, and mind are the very tools we use for becoming enlightened and for helping others along the path. The Buddha tells us to let go of grief for the world and to be contented and joyous. He recommends that we enjoy the company of loving friends and also enjoy solitude. To take time for our own renewal will benefit everyone.

The Buddha is specific in recommending time for meditation. When we become more at peace, the world becomes more at peace. When we become more loving, there is more love in the world.

Prayer/Meditation

Suggested ten minute meditation on the last year of your life.

Please sit comfortably and become aware of the movement of the breath. (Leader: Wait for about three to five of your own breaths.) Now imagine as clearly as you can that you have been told that you have only one year to live. You will be relatively healthy, active, and without pain until the last two months, then you gradually will become weaker and become bed ridden.

Please look at every major area of your life to see what you would do with it in this last year. What is most important to do in this last year? Include your job...unfinished projects...travel...hobbies...house...your spiritual practice...your family. Notice what things you would discard or spend less time on, and what things you would spend more time on.

Allow ten minutes, then ask people to come back to full awareness of the room. (Allow for a little transition time.) Ask people to share a bit of what they saw. Since none of us knows

whether we have a year to live, or more or less, we might wish to change our priorities now, to ensure that we are able to do some of the things we would like to do before we die.

(There are no right answers. People usually find that they let go of their job first. Family and spiritual practice usually move up much higher in priority.)

Closing Dedication

Because we are aware of all those who suffer, we practice not only for ourselves but to be able to help others better. At the end of a time of practice together we dedicate the merit to them all.

Sharing of Blessings

(Now let us chant the verses of sharing and aspiration)

From the goodness that arises from my practice,
May my spiritual teachers and guides of great virtue,
My mother, my father and my relatives,
The sun and the moon,
And all virtuous leaders of the world,
May the highest gods and evil forces,
Celestial beings, guardian spirits of the earth,
And the lord of death,
May those who are friendly, indifferent or hostile,
May all beings receive the blessings of my life.
May they soon attain the threefold bliss
And realize the Deathless.
Through the goodness that arises from my practice,
And through this act of sharing,
May all desires and attachments quickly cease,
And all harmful states of mind.
Until I realize Nirvana,
In every kind of birth.
May I have an upright mind,
With mindfulness and wisdom, austerity and vigor.
May the forces of delusion not take hold,
Nor weaken my resolve.
The Buddha is my excellent refuge
Unsurpassed is the protection of the Dharma.
The solitary Buddha is my noble guide,
The sangha is my supreme support.
Through the supreme power of all these,
May darkness and delusion be dispelled.

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