



ATFE

Association for
Theological Field Education

2019 ATFE Biennium

**MEETING MINUTES &
COMMITTEE REPORTS**

Feb. 1-2, 2019

ATFE Biennium Meeting Minutes

February 1, 2019

Tracy Hartman called the meeting to order.

It was moved and seconded that the agenda be approved. The motion passed.

It was moved and seconded that the minutes from the 2017 biennium be accepted. The motion passed.

Tracy Hartman presented the Chairperson's address and report. She highlighted several initiatives that the steering committee embarked upon over the past two years these included;

1. The recruiting of new ATFE members

This resulted in a small increase in overall membership. Dr. Hartman encouraged all ATFE members to reach out to colleagues who are in Field education but not active in ATFE and invite them to join.

2. The Streamlining of the process by which we pay dues

We made good progress in giving more ways for dues to be payed, although we remain open to improving this aspect of our societies life.

3. Increasing the value of ATFE membership in years between meetings

Four different webinars were presented over the past two years.

A quarterly newsletter was developed and sent out to ATFE members

4. Providing a more relevant and cost effective consultation

Dr. Hartman outlined several ways in which the steering committee tangibly cut costs in the planning and hosting of the 2019 consultation. She also highlighted some adjustments and improvements made to the planning of the program that were in response to feedback from the last consultation.

5. Providing a more open process for steering committee

The Chair briefly explained the way that the nomination process was adjusted to accommodate the memberships desire for a more open process.

Dr. Hartman concluded with a challenge to the membership to courageously meet the challenges of doing Filed Education to today.

John Senior (ATFE treasurer) presented the Treasurer's report and budget for 2019-21. John highlighted some of the significant issues related to the revenues and expenses for the past two years. He noted that we are underbudget for the past two year period and our financial picture is strong at the current time.

Dr. Senior gave an overview of the proposed budget for 2019-21. He noted several items for attention in the proposed budget.

A question from the floor enquired about dues payments. It was clarified that dues are payed yearly. John noted that he would like to develop a response to people and schools when they payed their dues.

A request was made that invoices be sent out with the request for dues payment so that a paper trail can be created for dues payment.

Matt Floding was invited to present a potential site for the 2021 ATFE gathering. Matt introduced Tampa, FLA as the possible site for our 2021 gathering. A motion was made to affirm Tampa as the site for our next biennium. The motion was passed.

Dr. Hartman presented the rational behind, and the actual process of a new nominating process for steering committee members. Ultimately the new process seeks to be more open to input from the membership as a whole as well as allowing for input from the nominating committee to assure that there is some continuity between past committee's and the new one.

The nominees for the new steering committee were introduced;

Barbara Blodgett – Chair

Dipa Hart – Vice-Chair

John Senior – Treasurer

Jenny Witcher – Communications

Daniel Poole – Secretary

Nick Works – Member at Large

Tom Elliott – Member at Large

Nominations from the floor were invited. No further nominations were put forward.

Barbara Blodgett presented a draft of the proposed document for a Professional Conduct Policy.

Dr. Blodgett noted that the policy in not emerging from any particular situation but rather is a proactive step to serve ATFE. The policy is largely based on the policy developed by the

Society of Christian Ethics. It has been vetted by a lawyer who understands policies of conduct. It covers a number of issues that are germane to the overall work of our society. The policy calls for a four person committee (PCC) to serve as an investigative panel should any complaints be brought forward. Dr. Blodgett also highlighted a number of features in the policy for the membership to be aware of.

Some discussion about how the policy would apply to people who attended the consultation but were not members ensued.

A question about the representation of Caucus's on the PCC was posed. Barbara noted that diversity on the panel is important but that the panel represented the membership as a whole and not be guided by any particular affiliations.

A question about how the PCC would be nominated and ultimately appointed was raised and would there be meetings if there were no complaints. Barbara noted that there was openness to nominations and suggestions for possible members. Besides an initial organizational meeting there would probably not be any regular meetings of the committee.

There were some questions and discussion about the overall scope of the policy. Barbara noted that the policy did include behaviour that occurred in one's professional role as a field educator even if it was not explicitly connected to ATFE.

Some input was given about places where the policy could be clarified before a final draft was presented for approval.

Tracy Hartman suspended the meeting until we reconvene for further business Feb. 2, 2019.

ATFE Biennium Meeting Minutes

February 2, 2019

Tracy Hartman called the meeting to order.

Lee Beach presented a verbal overview of caucus activity over the past two years.

Lee Beach presented the steering committee secretary's report. Acceptance of the report was moved and seconded. It was approved.

Jenny Witcher presented the communication directors report. Acceptance of the report was moved and seconded. It was approved.

Barbara Blodgett presented the research and publications committee report. She introduced Christine Zaker as new chair of the committee. Acceptance of the report was moved and seconded. It was approved.

Barbara Blodgett presented an edited version of the proposed document for a Professional Conduct Policy. It was moved by the steering committee that the document be accepted. The motion passed.

John Senior presented the second reading of the 2019-21 budget. It was moved and seconded that the budget be accepted as proposed. The motion passed.

The nominees for the new steering committee were re-introduced, including Matt Floding as the member for local arrangements for the 2021 consultation. The committee was elected by acclamation.

John Senior presented a proposal that the past chairperson of the steering committee be kept on the new steering committee as an ex-officio (non voting) member.

The issue of the need for more diversity on the steering committee was raised.

It was moved that the past-chairperson of the steering committee remain on the committee for the next biennium. The motion passed.

A discussion ensued on the topic of diversity on the steering committee.

The possibility of a rotating position for someone who represents a more diverse population could join the committee was raised.

A comment was made that greater diversity would not happen on its own, structure would need to be changed if diversity is going to increase.

The idea that one of the elected committee members could serve as a consultant over the next two years with different ethnic groups within ATFE to assure that the steering committee reflects greater diversity in the future.

A comment was made that when you look over past steering committee's memberships there is diversity represented. Perhaps we do not have a problem.

We were reminded that diversity is not just race, there are other ways (language, LGBTQ, etc.) that diversity needs to be considered.

It was noted that the steering committee takes great care to consider issues of diversity when it is considering decisions that affect the ATFE membership.

It was suggested that nominations not be restricted to people who attend the biennium but should include all dues paying members.

It was suggested that the new steering committee look at the nomination process.

It was moved and seconded that the steering committee review and revise the bylaws on nominations with a view to clarity and greater diversity on the steering committee before the next biennium. The motion passed.

The steering committee was charged with the responsibility to report back to the membership at the next biennium.

It was moved and seconded that the business meeting be adjourned. The motion passed.

2018 ATFE Communications Director Report

By: Dr. Jenny Whitcher, Communications Director, ATFE Steering Committee & Founder, Juniper Formation

My primary work in 2018 was to lead a rebranding process, which included a redesign of the ATFE logo and the creation of an ATFE Style Guide by Rev. Dr. Jason Whitehead, Director of Consultation & Formation at Iliff School of Theology. Using the new logo and style guide, I then redesigned the ATFE website.

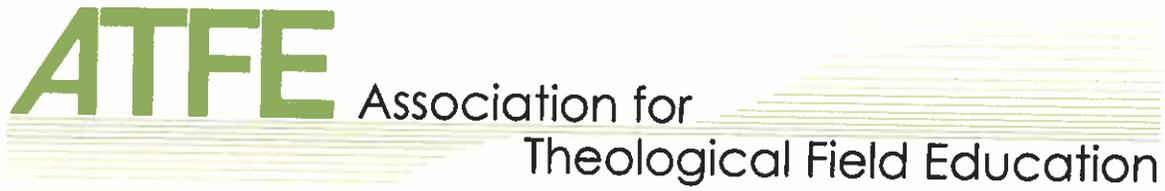
This rebranding effort initially stemmed from our need for: 1) a higher quality logo that could be resized without losing quality (i.e.: pixelation), and 2) a visual identity that better represented the energy the Steering Committee and members are investing into ATFE, and our desire to grow and invite others into ATFE.

The guiding creative vision for the rebranding was to better communicate the story of who we are and who we aspire to be as the Association for Theological Field Education (ATFE). This included a focus on key descriptors of: contextual, relational, diverse, vibrant, and relevant.

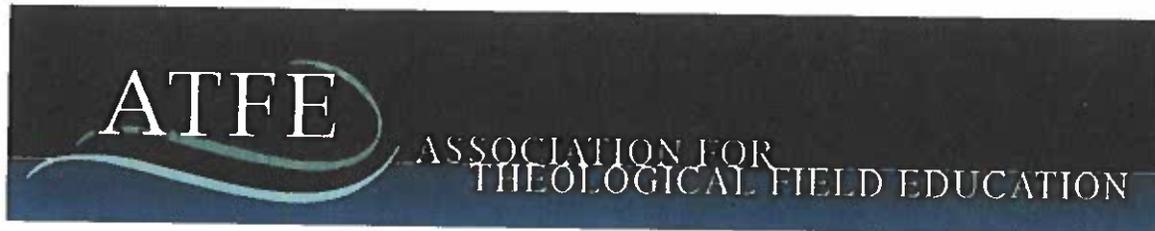
The outcome of the rebranding process included:

1. Development of a more contemporary logo that was simple and clean, especially given the length of the ATFE name. The ATFE Steering Committee chose this logo out of a number of options and described their interpretation of the design as:
 - a. The color green represents: growth, that we are trying to expand the field, deepen our professional relationships and development, and increase membership.
 - b. The sweeping flow of the horizontal line work of the banner logo represents: the Spirit moving through our work; the past, present, and future moving together; a sense of movement representing the community-engaged and ever changing nature of our work; and the diversity and broadening of our field.
2. Development of a simple and user-friendly ATFE Style Guide, which identifies:
 - a. An ATFE color palette with corresponding monochromatic variations on the primary theme, and complementary colors to provide contrast and vibrancy.
 - b. Typography
 - c. Vertical ATFE logo and website header
3. Development of a more contemporary and dynamic website design and structure, which included:
 - a. Identifying and applying a new website theme (i.e.: design layout)
 - b. Shifting to an image-based design, compared to the previous text-heavy design. Imagery is intentionally people- and context-based to communicate a more relatable and relational web presence and a context-based visualization of ATFE.
 - c. Addition of video recordings of Contextual Education Webinars (e.g.: <http://atfe.org/con-ed-resourcing-new-field-education-supervisors/>)

New ATFE Logo (website header version):



Previous ATFE logo:



ATFE Style Guide:

Color Palette



Monochromatic Shades (Colors which provide variations on the primary theme)



Typography

Font: Century Gothic

A spacious, modern version of a classic mid-century font, the Century Gothic® design embodies the digital age with its sleek sans serif style, but still retains the graceful geometric look common to early 20th century typefaces | fonts.com

Complementary Colors (Colors which provide contrast and vibrancy)



ATFE Logos



Website header



Triadic Colors (Colors which can provide a vibrant theme, using one color as primary and others as accents)



Screenshot of New ATFE Website Homepage:

ATFE Association for Theological Field Education

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Con.Ed.: Resourcing New Field Education Supervisors

Title: Resourcing New Field Education Supervisors for the Ministry of Supervision Presenter: The Rev. Allison St. Louis, Ph.D., Director of Field Education and The Second Three Years Program, Virginia Theological Seminary, Alexandria, VA Date: Wednesday, January 24, 2018 Time: 11:00 a.m.-12 noon (EST) This webinar is designed [...]



Call for Papers

Next Issue's Theme, Formation, Supervision, and Gender Diversity, Volume 39, 2019 In the last few decades there has been a significant change in how gender and human sexuality is understood. Correspondingly there has been an expression of greater gender diversity among the general population. So [...]

The Association for Theological Field Education (ATFE), 501 (c) (3), was founded in 1946 to provide a forum to identify, study, research and act upon issues of significance to theological field education. ATFE connects and bridges theory and practice, academy and church, local and global contexts, and the wisdom of the past and the dreams of the future. [More...](#)

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ATFE Steering Committee Secretary's Report 2017-19

The ATFE committee for the two year term of 2017-19 has been composed of the following individuals:

Tracey Hartman – Chair
John Senior – Treasurer
Lee Beach – Secretary
Jenny Witcher - Communications
Barbara Blodgett – Member at Large
Alison St. Louis – Member at Large

Also Barbara Sutton served as Vice- Chair for the first half of our two year term and Axel Schober served briefly in the area of communications. For personal and work related reasons both had to leave the committee before the end of their tenure.

The committee met regularly via various online platforms over the two-year period that it was elected for. Many details regarding the 2019 consultation and the overall work of ATFE were discussed and action was taken as appropriate. The following report offers an overview of the committee's activities and major discussion points during the past two year period.

The committee evaluated the 2017 biennium and discussed possible ways to improve upon certain aspects of the conference and even whether there needs to be significant revisions to the format as a whole. Key areas of discussion included morning worship segments and excursions.

The committee considered and approved a budget for the 2019 consultation.

It was decided that we would pursue the following dates and venue for the 2019 biennium; Jan. 30-Feb 2, 2019 at the Crowne Plaza Hotel in Asheville, NC.

Throughout the two year period, led by our treasurer John Senior the committee monitored the finances. The current funds available have remained consistent with past years and the overall financial picture remains very positive.

The committee discussed the possibility of beginning a series of continuing education workshops to be delivered online. Several workshops were approved and delivered over the past two years.

The committee led by Jenny Witcher developed a new logo and design for the ATFE website.

The committee developed and implemented a plan for reaching out to schools who had become inactive members of our association and schools that have never been a part of ATFE. Field Education directors and/or Deans of these schools were contacted and invited to consider participating in ATFE. At least three new members joined ATFE as a result of this initiative.

The committee revised the application form for leading breakout sessions at the biennium.

The committee sent out invitations for breakout proposals and spent time reviewing proposals as they were received.

The committee discussed price point for registration.

The Committee discussed the need to develop a policy for cancellation. It was agreed that a full refund would be available up to November 30. A refund of 50% would be offered Dec. 1 until Dec. 31 and no refund would be offered following Dec.31st.

The committee agreed that ATFE needed to develop a policy on standards of professional conduct. Barbara Blodgett was assigned to develop a draft policy for review. The draft was reviewed by the committee and has been sent out for input from a lawyer. It was agreed that we would hire VTS's lawyer, JB Burtch, at a flat rate of \$200 to review our Standards policy.

It was agreed that adding the past chair as a committee member should be brought to the membership as an issue to be voted on.

It was suggested that we add a call for nominations to conference registration and that there be opportunity for further nominations to be offered from the floor during one of our business sessions. The goal is to open up the process for more inclusivity and engagement from our members.

The committee discussed the nomination process and agreed that it is essential (according to our bylaws) for us to have a nominating committee in place. We discussed the makeup of this committee and how it could best function in concert with the current nomination process. Tracy Hatman and Joe Bush (past president) will serve as the nominating committee for the 2019 consultation.

The committee discussed the appropriate way to deal with nominations and with the new way that we have approached it this year. It was decided that the nominating committee would produce a slate of nominations based on what has already been generated by the membership. Nominees will be given 2 minutes to speak about their interest in serving on the committee in a business meeting at the conference. A general election will be held in the second business session to elect the new steering committee.

It will be proposed at the conference that ATFE consider a bylaw change that will allow the past president to remain on the committee in an advisory role.

The committee discussed the need to develop a new nomination process and bring a proposal to the Ashville gathering for the membership to consider.

A request that the steering committee provide \$250 from this year's budget for the R&P committee to host a lunch for the excellence in supervision project. It was agreed that this money could be reallocated from the steering committee's travel budget.

Respectfully Submitted,

Lee Beach
(ATFE secretary 2017-19)

Biennium Treasurer's Report

January 29, 2019

The main achievement of the 2017-2018 Steering Committee with respect to ATFE financial resources is in creating significant savings in most 2017-2018 budget line items. These savings resulted in a \$10,924.86 surplus in relationship to the 2017-2018 budget. The Steering Committee's financial restraint responded to the mood at the 2017 biennial meeting in St. Paul, at which our membership expressed concern about the impact of declining revenue from membership dues over the last many years on ATFE's financial health.

The most dramatic savings came from the Steering Committee line. The budget for this item was set at \$14,000 in the 2017-2018 budget, and the actual for this item in the 2015-2017 biennium was \$12,223.51. Our Steering Committee spent \$2,824.93 in 2017-2018. We achieved this savings by changing our travel practices in preparation for the biennium consultation. In past biennia, the entire Steering Committee joined the Local Arrangements Committee for one or two on-site meetings to work on the consultation. In the 2017-2018 biennium, the Steering Committee did not join the Local Arrangements Committee for on-site meetings. (Indeed, the Steering Committee has not met in person at all since the last biennium in St. Paul.) Instead, the Steering Committee largely left the work of local arrangements to the Asheville team, making decisions based on recommendations from Local Arrangements as appropriate. Additionally, two Steering Committee members (Tracy Hartman and John Senior) served on the Local Arrangements Committee, which made communication between both committees more efficient.

The Steering Committee did not employ a part-time registrar in the 2017-2018 biennium, saving another \$1000. Instead, the Steering Committee worked together to update and maintain membership records, handle the flow of dues payments, and coordinate communication to ATFE membership.

The new budget calls for increasing our funding commitment to *Reflective Practice*, from \$2,000 in 2017-2018 to \$3,200 in 2019-2020. This matches previous levels of financial support for the journal. The new budget also calls for increasing the funding for the Research and Publications (R&P) committee from \$3,000 in 2017-2018 to \$4000 in 2019-2020. R&P supported new online seminar offerings for ATFE members and innovative research projects in 2017-2018. Additional funding will allow R&P to do more of this work. Finally, the line for website support is increased slightly in the new budget, as we overspent our budget target on website platform fees.

The anticipated total cost of the Asheville biennium (\$27,698.37) is a savings on some past consultations. Our anticipated revenue for the event is \$3,3929.63.

We continue to struggle with meeting our budget target for membership revenue. In 2017-2018, we received \$20,841.78 in membership dues, \$3,158.22 less than the \$24,000 budget target. While our savings more than made up for this deficit, ATFE should continue to consider how we want to address these shortfalls in membership dues.

As we enter the new biennium, our cash reserves will be at about the same levels as they were in January 2017, once all of our outstanding expenses related to the Asheville biennium are paid.

All in all, ATFE is in strong financial health.

Respectfully submitted,

John Senior
Wake Forest University School of Divinity

A	B
1	Balance Sheet
2	Biennium beginning checking account balance \$44,634.00
3	ASSETS (as of 1/28/2019)
4	Bank of America Checking \$45,615.70
5	Bank of America CD \$5,009.63
6	Biennium Revenue (Duke Event Registration Site) \$34,979.00
7	Total Cash and Bank Accounts \$85,604.33
8	Total Assets \$85,604.33
9	
10	LIABILITIES AND EQUITY (as of 1/28/2019)
11	Liabilities (anticipated 2019 biennium expenses) \$27,698.37
12	Equity \$85,604.33
13	Total Liabilities and Equity \$57,905.96

D	E	G	H
2017-2018 ATFE Budget			
Income	Budgeted	2017-2018 Actual	Surplus/Deficit
Total Dues (2017-2018)	\$24,000	\$20,841.78	-\$3,158.22
Other	0	\$405.23	\$405.23
TOTAL	\$24,000	\$21,247.01	-\$2,752.99
Expenses	Budgeted	2017-2018 Actuals	Surplus/Deficit
Administration	\$500	\$199.67	\$300.33
ATS	\$2,200	\$1,834.20	\$365.80
Reflective Practice Journal	\$2,000	\$2,000.00	\$0
Membership Recruitment	0	0	\$0
Miscellaneous	\$300	\$154.70	\$145.30
Proceedings	0	0	\$0
Research and Publications	\$3,000	\$2,790.96	\$209.04
Steering Committee	\$14,000	\$2,824.93	\$11,175.07
Website	\$300	\$317.69	-\$17.69
Scholarship	\$500	0	\$500.00
Registrar	\$1,000	0	\$1,000.00
Expenses Total	\$23,800	\$10,122.15	\$13,677.85
REGULAR BUDGET TOTAL	\$200	\$11,124.86	\$10,924.86

J	K
2019-2020 Proposed ATFE Budget	
Income	Proposed Budget
Total Dues (2019-2020)	\$20,000
Other	0
TOTAL	\$20,000
Expenses	Proposed Budget
Administration	\$500
ATS	\$2,100
Reflective Practice Journal	\$3,200
Membership Recruitment	0
Miscellaneous	\$300
Proceedings	0
Research and Publications	\$4,000
Steering Committee	\$8,000
Website	\$400
Scholarship	\$500
Registrar	\$1,000
TOTAL	\$20,000

2019 Asheville Biennium	Budgeted	Anticipated Actual
Revenue	\$39,000	\$33,929.63
Expenses	\$39,000	\$27,698.37
BIENNIUM TOTAL	\$0	\$6,231.26

Recommendation: Membership dues stay at the same rates as the 2017-2018 biennium i.e. \$150 for institutional membership, \$130 for non-U.S. institutional membership, and \$110 for individual membership.

2017-2019 Dues Breakdown	Budgeted	2017-2018 Actuals
2017 Dues	\$12,000	\$10,190.87
2018 Dues	\$12,000	\$10,650.91
TOTALS	\$24,000	\$20,841.78

ATFE Research & Publications Committee Report

The Research and Publications Committee has worked during the 2017-2019 biennium to support and encourage ATFE members in their research, writing, and publication. Our work is one of the significant things that ATFE offers to its members in between biennial consultations.

Writing Webinar

The committee contracted with seasoned editor Beth Gaede to offer a free videoconference workshop on writing for dues-paying ATFE members. This webinar, held May 16, 2017, was geared toward getting organized and getting started with the writing process. Eight ATFE members participated and all found it useful. One participant wrote by way of evaluation: *“The webinar was helpful and Beth’s expertise was appreciated. Her counsel to each person from the various aspects they were coming from was enlightening. There were questions asked that I didn’t know to ask. The group process was the highlight.”*

The committee chair followed up with each participant individually several months later to further encourage them in their writing process. For many field educators, carving out time for writing is the greatest challenge. As one participant wrote in the evaluation: *“I think the input will help when I free up some time for myself.”* Nevertheless, the committee stands ready to form and support a formal ATFE writing group any time one should be desired.

“How to Get Published” Breakout Session

With a transition in Beth Gaede’s vocational life, she is no longer available to offer her longstanding breakout session, on how to develop a book for publication, at the 2019 ATFE biennial meeting. However, the committee found a replacement in Rolf Janke, Executive Editor for Religion and Sociology for Rowman&Littlefield, and we look forward to his session in Asheville.

Online Bibliography

The committee has long maintained a list of publications by ATFE members on the ATFE website. Now we have supplemented this list with an annotated bibliography of books that ATFE members find useful in their work as field educators (an overlapping list of publications!). This bibliography can be found under the “Resources” tab of the ATFE website.

Grants

The committee awarded two grants during the 2017-19 biennium:

- to Deborah Penny for her project at North Park Theological Seminary on using the Intercultural Development Inventory with seminarians: “Using Spiritual Direction and Practices for Intercultural Development” and
- to Matt Floding (Duke Divinity School), Sung Hee Chang (Union Presbyterian Seminary), and John Senior (Wake Forest Divinity School) for their project on leveraging the power of supervisor-mentor formation stories in mentoring students: “Stories of Formation From the Field.”

2019 Biennial Consultation Events

Finally, the committee will be sponsoring three events during the biennial consultation in Asheville:

- Happy Hour With An Author* (organized by Barbara Blodgett): A gathering for informal discussion and celebration of works by ATFE members and friends that have been published during the biennium (Thursday Jan 31 at 4:45pm);
- The Book Table* (organized by Chrissy Zaker): Committee members will be available throughout the biennial consultation to sell books written by and for ATFE members. This year, we are pleased to announce that we will be able to accept credit cards for payment in addition to checks and cash.
- Excellence in Supervision Writing Group* (organized by Matt Floding): Inspired by the need to update the 1993 statement adopted by ATFE called “Excellence in Supervision” which attempted to set standards for field education programs, directors, and supervisor-mentors, Matt Floding will be convening any ATFE members interested in submitting articles to *Reflective Practice* around the theme of excellence in supervision (Saturday Feb 2 lunch immediately following the close of the Consultation).

The Research and Publications Committee organizes itself each biennium at a pre-consultation meeting to which anyone is welcome. Come join us on Wednesday, Jan 30 at 1pm to help plan projects and events for the 2019-21 biennium!

ATFE Standards of Professional Conduct and Grievance Procedure¹

Section 1: Statement of ATFE Values

The Association for Theological Field Education is an international, ecumenical community whose purposes include maximizing the quality of service to theological field education and providing for optimal growth and development of field education personnel.² In pursuit of these purposes members of the Association have particular professional commitments and responsibilities toward one another. In addition, we are a community that has always been marked by “an extraordinary degree of collaboration and a spirit of generosity”³ as we go about professional development, inquiry, and research.

We value contextual education and practical ministry formation. We bring many identities to our work together of forming and educating students in context for ministry.

As educators we always seek to improve the methods for and approaches to our work. We exercise our authority justly with concern for the development of our students, community partners, and colleagues, respecting their dignity and the boundaries appropriate to professional interaction.

As researchers we hold ourselves to a standard of free, rigorous, and intellectually honest inquiry aiming to advance theological field education.

As participants in institutions we foster just relationships with students, faculty, and staff, as well as with the colleagues and communities outside our institutions that we partner with to provide education and formation.

As members of the Association we conduct interactions with colleagues openly, fairly, and respectfully. We execute our duties competently and justly without prejudice toward those with different values, viewpoints, and identities. We welcome and take action to ensure the full participation of new members and those who bring new voices to our conversations.

Section 2: Statement of Professional Conduct

¹ Much of the language in this document has been borrowed from the Society of Christian Ethics’ “Standards of Professional Conduct,” January 2015, and is used by permission. ATFE is grateful to SCE for their work and for their generosity.

² ATFE Bylaws, Article II

³ Joe Bush, former ATFE Chair

Certain conduct so clearly affronts the dignity of persons that it contravenes the minimal conditions for participation in our community. Accordingly, in activities that occur under the auspices of the Association we will neither practice nor tolerate any form of harassment or unjust discrimination, in deed or word, based on race, gender identity, nationality, ethnicity, religious or spiritual community, theology, sexual orientation, age, disability, political affiliation, or socioeconomic status. We will not practice or tolerate, in deed or word, behavior that displays disrespect for the personal integrity of others as they carry out their responsibilities within the Association. While we may continue to practice generosity with respect to sharing ideas and research findings with one another, we aim to appropriately acknowledge and reference each other's work and will take care not to plagiarize or infringe copyright.

The primary purpose of this document is to promote the values outlined above by adopting standards for the professional conduct of our members and setting forth a grievance procedure for their reinforcement. These standards, organized under three headings (respect for difference, respect for personal integrity, and respect for intellectual integrity), aim to protect the values of our Association, to protect members from being treated in such a way that they cannot enjoy the full benefits of membership and activity in the Association, and to educate all members about the standards of behavior that membership in our scholarly community requires.

It is our responsibility, as a community of professionals, to develop and sustain our own standards of conduct. We therefore publicize these commitments and standards, and commit to renewing them by regular examination and, if appropriate, revision. Questions and concerns, and especially reports and complaints of violations of professional conduct, will be listened to, taken seriously, and responded to fairly and constructively.

These standards apply to all members of ATFE, and other individuals attending Consultations and other meetings and activities directly connected with the Association's work. (Individuals to whom these standards apply shall hereafter be referred to in this document as "members".) These standards also will be shared with invited speakers and other non-members who register for ATFE meetings.

A. Respect for difference

We commit ourselves to sustaining a secure and open environment for discussion at our biennial Consultations. We expect, from ourselves individually and each other, thoughtful and constructive analysis and reflection—discourse which serves to invite, rather than diminish or marginalize, the participation of those to whom and about

whom we are speaking. We respect each other through the civil language that we employ in panels, presentations and conversation.

B. Respect for personal integrity

We commit ourselves to honoring the physical, moral, and sexual integrity of all ATFE members. In all of our professional interactions connected with ATFE, we will treat fellow members and guests with the equal regard due to them as fellow human beings and fellow professionals, according to the norms of justice, honesty, fairness, dignity, and care. We recognize that each of us has a right to claim our own physical safety and security, as well as to make our own decisions and keep our own commitments in matters concerning romantic and sexual relationships. Participation in the roles, activities, and events of ATFE should depend solely upon professional interest and competence. No one's claim to participation should be conditioned upon a threat, implicit or explicit, to her/his personal integrity.

C. Respect for intellectual integrity

No scholarly progress can be made without freedom of thought, speech, and publication. ATFE encourages its members to formulate and present their ideas and research with freely exercised imagination and responsibility, in accordance with respect for persons and standards of professional judgment. Good scholarly work requires a high degree of discretion exercised by members in determining the appropriate context and presentation of material. This norm applies to both oral and written form. Respect for intellectual integrity also requires us to accurately present the work of other scholars with whom we are in conversation, particularly if we disagree with them. Finally, we must appropriately acknowledge our debt to the scholarly endeavors of others, by citing them fully and fairly in accordance with prevailing scholarly standards. Respect for intellectual integrity consists in protecting the conditions for and honoring the fruits of the vocation to scholarship, in order to facilitate a creative, honest, and rigorous scholarly conversation.

Section 3: The Grievance Process

A. The Purpose of the Grievance Process

The grievance process provides structure and guidance for responding to evident or alleged violations of professional conduct. The process may be applied only to grievances between members of ATFE, that is, to members of ATFE aggrieved by the conduct of other members. It may be applied to behavior outside of ATFE gatherings and business, including behavior at the member's home institution.

In some situations, an informal, mediated conversation among parties suffices to determine what happened and then to resolve a hurtful misunderstanding or repair an unintentional offense. The ATFE Steering Committee stands ready to mediate such conversations and to seek informal resolutions and reconciliation between or among members. If such mediation is successful, the ATFE Steering Committee will generate no written record, though its chair will be informed that a conversation took place. This document outlines a formal grievance process to be used when mediation has been unsuccessful and/or aggrieved ATFE members have not reached satisfactory resolutions to their complaints in other ways.

The process is intentionally flexible, allowing scope for discretionary exercise of its provisions in response to morally relevant differences in particular cases, such as the gravity of alleged misconduct and whether or not misconduct was intentional. Where possible, the process should aim at achieving reconciliation on fair terms. In some cases, the duty to maintain the values and commitments of ATFE may require the application of sanctions. Any intervention should aim at supporting and strengthening ATFE's efforts to safeguard respect for difference, personal integrity, and intellectual integrity.

The grievance process should not be regarded as a substitute for legal action.

B. The Professional Conduct Committee

The Steering Committee of ATFE authorizes a Professional Conduct Committee (PCC) to interpret and apply the grievance process, to evaluate complaints brought under it, and to make recommendations to the Steering Committee in response to such complaints.

The ATFE Steering Committee shall appoint members to the PCC. It shall total four members with two-year terms coinciding with ATFE biennia. Two members shall rotate off every two years, providing for staggered terms and continuity.⁴ If a case is pending at the conclusion of a biennial Consultation, at least the chair will continue until its resolution. Members of the PCC should be seasoned members of ATFE, who possess sound and sober judgment, as well as tact, discretion, and skill with people. In aggregate, they should represent the ATFE community in all its diversity. Members of the PCC are encouraged to take relevant training for their role at their home institution or elsewhere if it is available to them. Allowing for the possibility of a conflict of interest between a member of the PCC and the complainant(s) or

⁴ Two of the inaugural members will be asked to serve for four years before rotating off.

respondent(s), that member of the PCC will acknowledge the conflict and recuse herself/himself from case review and deliberations over intervention if any are forthcoming. Likewise, if any member of the PCC is named in the complaint, he or she will not participate in deliberation of the case.

C. The Grievance Procedure

The parties of a grievance are: Complainant(s), Respondent(s), Chair (of the PCC), Representative (of the PCC), and the PCC.

i. The Initial stage

A member bringing a grievance (the Complainant) to the PCC is encouraged to contact the PCC as soon as possible after an incident has occurred. The Complainant should bring a grievance directly to the Chair of the PCC, who ensures that all inquiries and complaints are properly undertaken and concluded. However, in cases it deems sufficiently serious, the PCC reserves the right to pursue the inquiry independent of the Complainant's participation. In these cases, the PCC will consult with the ATFE Steering Committee about how to proceed.

When a grievance is brought to the Chair, the Chair shall promptly convene the committee, by telephone if need be, and assign a member of the PCC to handle the case as its Representative.

Note: The PCC will protect the privacy of both the Complainant and the Respondent in every way possible during the process of the complaint and thereafter. However, all parties should realize that the confidentiality of ATFE proceedings is not protected against legally mandated disclosure.

ii. Pursuing a complaint

The Representative will promptly and impartially solicit a signed, written statement from the Complainant (if the initial complaint was made to the Chair verbally). The PCC will not pursue complaints that are not put in writing by the complainant. The statement will be submitted to the person against whom the complaint is brought (the Respondent), with a request for a written response. Complainants will be assured confidentiality by the PCC but not necessarily anonymity. The Representative shall then solicit and investigate additional relevant evidence, including from others not necessarily aware of the complaint. The solicitation of comments from witnesses and others shall be done delicately and with circumspection. The PCC shall conduct its investigation in a timely manner, normally completing it within 30 days. The

Representative will write a report of the inquiry detailing additional evidence in the case.

The PCC will then meet to consider the case, including the statements by the Complainant and the Respondent, and the report on the investigation, and any recommendations by the Representative. The PCC shall reach its decision based on the preponderance of the evidence (at least 51% of the evidence supports the recommendation) and shall reach consensus whenever possible.

iii. Possible outcomes of the grievance procedure

There are four possible outcomes to the grievance process: No action, Restriction, Suspension, or Termination. Outcomes are determined by a majority vote of the PCC.

- a) The PCC might conclude that there is insufficient evidence of violation to warrant any action, and therefore officially close the investigation. The chair shall so notify the Complainant and the Respondent. No written record will be maintained of the incident or grievance.
- b) The PCC might conclude that the Respondent's membership in ATFE should be restricted. Restriction might include, e.g., ineligibility for receiving an ATFE grant, being a Consultation presenter, or serving as an ATFE officer. In addition, the PCC might require the Respondent to undergo some sort of education regarding professional commitments and appropriate professional behaviors.
- c) The PCC might conclude that the Respondent's membership in ATFE be suspended for a period of time. The Respondent would not be allowed to attend the Consultation or participation in other ATFE events during this time.
- d) The PCC might conclude that the Respondent's membership in ATFE be permanently terminated.

In the case of b, c, or d, the Chair shall prepare a written report detailing and justifying the proposed sanction. This report should include, as appendices, the statements of the Complainant and Respondent, as well as the Representative's report of the inquiry. The PCC shall provide the Steering Committee with this report and its appendices. The Complainant and the Respondent will receive a copy of the Chair's report and its appendices. In the case of c or d (i.e., the PCC's conclusion is either suspension or termination), the PCC's conclusion must be affirmed (or overturned) by the ATFE Steering Committee. The sanctions of suspension or termination require a 2/3 vote of the Steering Committee. The vote of the Steering Committee is final. The ATFE Steering Committee Chair will notify both the Complainant and Respondent in writing.

D. After the Grievance Process

The PCC will create a file for each case it has pursued. For each case in which a violation has been found to have occurred, the Chair of the ATFE Steering Committee shall maintain one electronic copy of the complete case file, which includes the Chair's report, including all appendices and, if applicable, the Steering Committee's decision. Any hard copies shall be destroyed immediately after the grievance process has concluded. ATFE Steering Committee chairs shall pass files on to their successors.

The PCC Chair shall prepare a written annual report to the Steering Committee, describing the number and general type of cases it has received during the previous year. The PCC Chair shall additionally prepare a short oral report, to be given at a biennial Consultation business meeting, summarizing the annual report but identifying cases only according to the kind of violation involved (regarding disrespect for difference, personal integrity, or intellectual integrity).