



THE CHURCH
OF ENGLAND

Ministry Council

Periodic External Review Report

**Bristol Diocesan Licensed
Lay Ministry Training and
Formation Course**

January – February 2016

**Ministry Division
Church House
Great Smith Street
London SW1P 3AZ
Tel: 020 7898 1412
Fax: 020 7898 1421**

**Published 2016 by the Ministry Division of the Archbishops' Council
Copyright © The Archbishops' Council 2016**

CONTENTS

GLOSSARY	1
LIST OF REVIEWERS.....	2
SUMMARY.....	4
FULL REPORT	8
SECTION ONE: AIMS AND KEY RELATIONS	8
A Aims and objectives	8
B Relationships with other institutions	11
SECTION TWO: CURRICULUM FOR FORMATION AND EDUCATION.....	13
C Curriculum for formation and education.....	13
SECTION THREE: MINISTERIAL DEVELOPMENT	16
D Community and Corporate Life	16
E Worship and training in public worship	18
F Ministerial, personal and spiritual formation.....	19
SECTION FOUR: EDUCATION AND TRAINING	21
G Teaching and learning: content, method and resources.....	21
H Practical and pastoral theology	23
SECTION FIVE: STAFF AND STUDENTS	24
I Teaching Staff.....	24
J All staff	24
K Students.....	27
SECTION SIX: GOVERNANCE, MANAGEMENT AND FINANCE.....	29
L Organisation and governance	29
M Business planning and risk management.....	30
N Financial policies	32
O Statutory and operating policies.....	32
P Accommodation	33
CONCLUSION	33
LIST OF RECOMMENDATIONS	34

GLOSSARY

ALMD	Adviser for Lay Ministry Development
ASE	Annual Self Evaluation
CPAS	The Church Pastoral Aid Society
Formation	Those aspects of the training concerned primarily with the development of character, faith and vocation
LLM	Licensed Lay Minister/Ministry (The Diocese of Bristol's preferred term for Reader ministry)
SSM	Self-Supporting Minister
SCRTP	South Central Regional Training Partnership
TI	Training incumbent
WEMTC	West of England Ministry Training Course

LIST OF REVIEWERS

The Rev'd Canon Nick Moir, Senior Reviewer, Vicar of St Andrew's Chesterton and Ministry Training Officer, Diocese of Ely

Miss Sue Waterston, Licensed Lay Minister and West Bingham Deanery Lay Chair, Southwell and Nottingham Diocese

The Rev'd Dr Angela Lauener, Curate (SSM) at St John's, Ranmoor, Diocese of Sheffield; Senior Lecturer in Information Systems, Sheffield Hallam University

THE PERIODIC EXTERNAL REVIEW FRAMEWORK

On behalf of the sponsoring churches, review teams are asked to assess the fitness for purpose of the training institution for preparing candidates for ordained and licensed ministry and to make recommendations for the enhancement of the life and work of the institution.

Within the structures of the Church of England, this report has been prepared for the House of Bishops acting through the Ministry Council.

In coming to their judgements, reviewers are asked to use the following outcomes with regard to the overall outcome and individual criteria:

Confidence

Overall outcome: a number of recommendations, none of which question the generally high standards found in the review.

Criteria level: aspects of an institution's life which show good or best practice.

Confidence with qualifications

Overall outcome: A number of recommendations, including one or more of substance that questions the generally acceptable standards found in the review and which can be rectified or substantially addressed by the institution in the coming 12 months.

Criteria level: aspects of an institution's life which show either (a) at least satisfactory practice but with some parts which are not satisfactory or (b) some unsatisfactory practice but where the institution has the capacity to address the issues within 12 months.

No confidence

Overall outcome: A number of recommendations, including one or more of substance which raise significant questions about the standards found in the review and the capacity of the institution to rectify or substantially address these in the coming 12 months.

Criteria level: aspects of an institution's life which show either (a) generally not satisfactory practice or (b) some unsatisfactory practice where it is not evident that the institution can rectify the issues within the coming 12 months.

THE REPORT OF THE PERIODIC EXTERNAL REVIEW OF THE DIOCESE OF BRISTOL LICENSED LAY MINISTER TRAINING AND FORMATION COURSE

January – February 2016

SUMMARY

Introduction

The Diocese of Bristol LLM Formation and Training Course is an integral part of its Ministry Development department and is led by the (half-time) Adviser for Lay Ministry Development (ALMD), with administrative support from the department.

Seven years ago there was a vision to find 150 new Readers and the training model moved from a three year course to a two year programme working with (and moderated by) the Methodist Church. The withdrawal of the Methodists, and the encouragement of the Hind report to work regionally, led to Bristol becoming involved with the *Exploring Christianity* programme that had been developed by the Diocese of Bath & Wells and others – and which is now overseen by the South Central Regional Training Partnership (SCRTP).

The ALMD was appointed as part of the *Releasing the Energy* strategy to oversee the whole programme and to develop a Formation year that would follow the two years of the *Exploring Christianity* foundational training.

This is the first review or inspection that the course has undergone.

Students enter the *Exploring Christianity* course before the process of discernment and testing of vocation to licensed lay ministry; only a minority of students proceed to the LLM Formation year. At December 2015 there were 11 candidates on the Formation year, together with 2 discerned for the next Formation year and one having completed the Formation year but not yet licensed. Of these, 8/14 are 50 or older, 10/14 are graduates or have professional qualifications and 8/14 are married.

The review took place primarily during 26-27 January 2016 - when the review team stayed in Bristol, met staff members, students and others, and attended two teaching evenings – and on Saturday 20 February, when two of the team attended a Saturday training event. The reviewers were supplied with the course handbook, the annual self-evaluations for 2014 and 2015, a statement of the aims of the course and an analysis of the students. At our request, sample portfolios, training agreements, feedback forms, as well as module books and policies, were made available. The staff and students were extremely co-

operative and helpful; the review team would like to express our warmest thanks to them for their welcome, warm hospitality, openness and good will.

Summary of outcomes

Our overall conclusion is

CRITERIA	OUTCOME
A. Aims, objectives and evaluation of the institution	Confidence
B Relationships with other institutions	Confidence with qualifications
C Curriculum for formation and education	Confidence with qualifications
D Community and corporate life	Confidence
E Worship and training in public worship	Confidence with qualifications
F Ministerial, personal and spiritual formation	Confidence
G Teaching and learning: content, method and resources	Confidence
H Practical and pastoral theology	Confidence
I Teaching staff	Confidence
J All staff	Confidence
K Students	Confidence with qualifications
L Governance, management, constitution and organisation	Confidence
M Business planning and risk management	Confidence with qualifications
N Financial policies and cost-effectiveness	Confidence
O Reserves policy and statutory liabilities	Confidence
P Accommodation	Confidence
Overall Outcome	Confidence with qualifications

General observations

This review comes at a time when the diocese is developing a new strategy and when there has clearly been a good deal of consideration about the merits of *Common Awards* and the external accreditation this would provide. It was not the remit of the review team to recommend one way or the other on this, but we were of the view that a change of policy in this matter would require a very major

reframing of the training and formation offered. There would be gains in this but also losses – not least the confidence-building nature of the *Exploring Christianity* course and the real openness to vocational discernment through a process that has been very carefully designed and is clearly well managed. We found the rationale for the current pattern of training to be sound and strategically led. Consideration of the *Common Awards* route may best be done when there is a need to do it – for instance, when the staff team changes significantly or the diocesan strategy regarding licensed lay ministry is reshaped.

The Report is written in relation to the Criteria set out in the *Quality Assurance and Enhancement in Ministerial Formation* Handbook October 2014. The paragraphs follow the Criteria which are printed in *italic* type. The reviewers' comments are in normal type and the recommendations in **bold**.

Strengths

- A comprehensive course handbook with a clear vision for licensed lay ministry and articulation of the course content and procedures.
- Careful integration with the vocational discernment process.
- Good use of self-evaluation reports and a 'critical friend' to identify where improvements can be made and to implement change.
- The shape, content and continuity of the Formation year.
- Good, well-structured modules and teaching materials.
- Some very good tutorial practice including the valuing of the experiences and insights of the student body.
- A student body that is engaged, supportive and positive about the training experience – and where there was much evidence of personal, spiritual and vocational growth.
- A consistent and thorough use of theological reflection throughout the Formation year.
- The use made of tutors and facilitators from around the diocese.
- Supportive, consultative and collaborative tutors' meetings.

Areas for attention

- The lack of quality control from the higher and further education sector.

- Relations with other local providers through the SCRTP.
- Whether sufficient resources are made available for alternative pathways to *Exploring Christianity*.
- The teaching of preaching and leading worship at a very late stage in the training.
- Consistent and extensive experience of, and reflection upon, the use of the authorised liturgies of the Church of England
- Consistent feedback on the conduct of worship.
- Experience of other faith traditions and inter-faith conversation.
- The lack of a complaints policy.
- The membership of the LLM Council in the light of its newly expanded role of providing governance for the course.

FULL REPORT

SECTION ONE: AIMS AND KEY RELATIONS

A Aims and objectives

Reviewers will consider whether the institution's aims are appropriate, clearly articulated and understood.

A.i Its aims, objectives and policies should be appropriate to the preparation of students for ordained/lay public ministry within the breadth of the traditions of the sponsoring church.

1. When considering the aims and objectives of the Institution, the review team considered whether or not there is an intentional strategy for the development of LLMs within the Diocese of Bristol. Through a review of the documentation available (including the *LLM Training and Formation Course Handbook* which we felt was of a very high standard), consideration of the diocesan strategies (past and present) and discussions with - inter alia - members of the staff team, volunteer tutors, the students themselves and the Bishop of Swindon, we were satisfied that such a strategy exists.
2. The three year programme is overseen by the ALMD who currently reports to the Head of Ministry Development and the Sponsoring Bishop, the Bishop of Swindon. This ensures that there is a coherent approach, ensuring the training delivered is in step with the wider diocese. The current Warden of Readers (recently appointed) also acts as Diocesan Director of Ordinands, Director of Initial Ministerial Education and Vocations Adviser. Whilst this may ultimately prove to be a challenge (both because of the workload and the potential conflict of interest), this multi-faceted role has the benefit of strengthening the links between lay and ordained ministry in the diocese.
3. There is a written policy for 'Licensed Lay Ministry Training and Formation' which is expanded upon in the course handbook. In conversation, we were satisfied that the diocese recognises that Licensed Lay Ministry is a local ministry, appropriate for the context in which it is situated, with an emphasis on collaborative ministry within a team. LLMs were described variously as 'lay theologians', 'bridge builders', 'partners in influence' (with clergy colleagues) and 'definitely not pseudo-clergy.' Not only is there an expectation that every LLM is an active member of their parish leadership

- team, but also that there are ‘observable differences’ in the manner in which LLMs are used from parish to parish - which allows for the breadth of traditions of the sponsoring churches to be honoured.
4. The handbook clearly describes how potential candidates for licensed lay ministry can explore this calling, through attendance at a diocesan discernment day, which normally would take place by the spring of their second year. Vocation advisers discern whether it is appropriate for candidates to continue to the Formation year. If they do so proceed, the current practice is for the ALMD to meet with the candidate and his/her incumbent in the summer prior to that year. This is in order to clarify any lay ministry experience previously undertaken and to make clear the expectations of the Course Director vis-à-vis both student and incumbent going forward, so the necessary Church of England’s standards for LLMs can be achieved. This includes the requirement for a working agreement during training, followed by a new working agreement once the training has been completed and the need for regular meetings between the trainee LLM and their incumbent. A ‘blended learning model’ is adopted in this Formation year which appears to be very successful and popular with students and tutors alike.
 5. It is clear that the aim of the three year programme (*Exploring Christianity* plus the Formation year) is to develop the appropriate disposition, knowledge and understanding, as well as appropriate skills and abilities, thus fulfilling the Church of England’s expectations of LLMs as people able to ‘preach and teach, to conduct or assist in conducting worship and to assist in the pastoral, evangelistic and liturgical work of the Church in the parish or area where [Readers] are licensed’. This is clearly enunciated in the course handbook and is also in accordance with the current diocesan strategy, *Creating Connections*, which has a vision of the church as ‘a life-changing movement that connects everyone with God.’ Those people with whom the review team spoke saw the role of LLMs as highly important in the potential success of this strategy, alongside the development of other lay ministries which may be recognised and commissioned at either deanery or parish levels.
 6. Once licensed, LLMs undertake a further year of training and formation, this being called ‘Formation plus.’ This serves a dual purpose of completing Initial Ministerial Education as well as sowing the seeds for future continuing development and learning.

- A.ii *They should be consistent with the current published policy statements of the sponsoring church(es).*
7. The aims, objectives and policies of the course have been informed by the Archbishops' Council's report entitled *Shaping the Future* (2005) as well as by the diocese's former strategy, *Releasing the Energy*, with its emphasis on collaborative ministry and leadership. In addition, they are in line with the South Central Regional Training Partnership (SCRTP) provision for LLM training as highlighted in the course handbook.
8. The current diocesan strategy cites as one of its aims 'to make incisive strategic shifts in relation to resourcing ministry and fostering connectedness in line with the national Church's Reform and Renewal Programme', which will result in the development of new foundations to 'help strengthen and renew the ministry and mission of local churches into the future.' The training of LLMs in the diocese, with its emphasis on local and contextual ministry, supports this strategy and is a significant part of it.
- A.iii *The institution should show that it has built on earlier learning, including through action in response to previous PER, curriculum approval and follow-up reports; other external bodies' evaluation; and self-evaluations.*
9. This is the first PER that the Bristol Diocese LLM Training Course has undergone. However, in line with the standard practice of annual self-evaluation required by Ministry Division, the course's external adviser – essentially a 'critical friend' -, conducted a Quality Visit in June 2015; the report's recommendations have been taken on board and acted upon. These include improvements in the marking process and the production of new terms of reference for the moderation panel. The number of tutor days has also been reviewed and increased.
10. Clear self-evaluation reports were conducted in 2014 and 2015, which revealed both an appropriate self-critical approach and also that action points highlighted have been taken forward.
11. Progress of the course including feedback from students, changes to the programme or issues arising from national expectations, is reported to the LLM Council on a quarterly basis by the ALMD.

The review team has confidence with regard to Criterion A, Aims, Objectives and Achievements of the Institution.

B Relationships with other institutions

Reviewers will look at how well the institution engages with partners:

- B.i There should be evidence of the institution's commitment to partnership with the other providers of theological education in the region.*
12. The *Exploring Christianity* course – the usual route of training for the first two years - was originally designed by the Diocese of Bath and Wells in partnership with Trinity College, Bristol. It is now 'owned', used and developed by a partnership group that also includes the dioceses of Monmouth, Llandaff, Exeter, Portsmouth, Swansea and Brecon, and Bristol, together with the Methodist District of Plymouth and Exeter. An alternative route is for would-be LLMs to complete two years of part-time training at Trinity for a Certificate of Theology before their Formation year. Pre-selection is required before attending this course.
 13. Other part-time courses are available locally, such as WEMTC and the Oxford Ministry Course (both at Ripon College, Cuddesdon) or Sarum College, and these provide other alternatives to *Exploring Christianity* prior to the Formation year.
 14. Students are required to find their own funding for these alternative courses, although some bursaries may be available.
- B.ii The institution should draw fully on the resources of universities in teaching, quality assessment, staff development and the promotion of research.*
15. There is evidence that some resources of universities are drawn upon for the benefit of teaching and also staff development. Tutors on the course are funded and encouraged to attend Teaching Days at Trinity College. External tutors at Trinity College deliver training for students on preaching skills and also half day courses on the basics of writing assignments.
 16. The development of the LLM Council is a positive addition to the governance of the Institution. However, we felt this could possibly be made more effective if someone with academic expertise could be recruited to the Council to help with the quality assessment process.

Recommendation 1

We recommend that the LLM Council look to appoint someone from the higher or further education sector to provide advice and assistance when reviewing the course.

B.iii It should engage effectively with local churches, other faith communities and secular organisations so as to enhance formation for public ministry.

17. There is evidence of effective engagement with local churches and secular organisations so as to enhance formation for public ministry. This includes courses provided by external providers (such as Bridge Builders and CPAS) as well as practical experience, including meeting with different chaplaincies, visiting crematoria and attendance at the Cathedral as part of broadening students' liturgical experiences.
18. The predominant way in which the course engages with local churches is through the training and placement incumbents in the parishes and teams in which the students exercise their ministry. We met with one training incumbent who spoke very positively about the process including the clarity of expectations which were clearly communicated to both him and his trainee LLM.
19. There is little evidence of inter-faith dialogue taking place as part of the training programme. That said, contact with the (multi-faith) workplace chaplaincy does take place. A strengthening of ties with this chaplaincy team, to include some multi-faith input into the curriculum, should be considered.

Recommendation 2

We recommend that the course consider strengthening the inter-faith content of the curriculum.

20. It became apparent during the review visit that the Institution's relationship with the wider partnership may benefit from a review. The 'critical friend' had also commented upon this in the Quality Assessment visit in June 2015, referring to 'the perceived reluctance to meet, and unclear "ownership" surrounding the partnership, with actions not being carried forward and meeting notes not being distributed. Poor communication within SC RTP is preventing the course from making the updates it deems important.

Recommendation 3

We recommend that the LLM Council considers how to press for clarity of purpose in the partnership and its procedures for curriculum review.

<p>The review team has confidence with qualifications with regard to Criterion B, Relationships with other institutions.</p>

SECTION TWO: CURRICULUM FOR FORMATION AND EDUCATION

C Curriculum for formation and education

Reviewers will consider the curriculum's design and content.

- C.i There should be a theological, formational and educational rationale for the institution's approach to mission and to formation for ministry and discipleship.*
21. While the Diocese of Bristol accepts and affirms the national criteria for Reader ministry, its *Releasing the Energy* strategy (now superseded by *Creating Connections*) has placed a particular emphasis on collaborative ministry within parish leadership teams.
 22. Initial LLM training normally takes three years, the first two of which are foundational and theological, the third year being formational (and avowedly non-academic).
 23. Three routes are offered for the foundational years: the *Exploring Christianity* course, the Certificate of Theology at Trinity College, or two (or more) years' training on another suitable part-time course. Course fees are required for all the options; in practice nearly all the students follow the first route. The vocational discernment process is not completed until students have begun their training. On a typical *Exploring Christianity* course only a proportion (perhaps 25%) will proceed to the LLM formation year. Thus potential LLMs are studying and being formed in diverse groups where different ministries and ways of living out Christian discipleship are being explored. We heard testimony from past and present students of how this sense of shared vocational journey (but to different ministerial ends) was enriching, and prepared future LLMs for participation in teams that are similarly diverse and supportive.
 24. The *Exploring Christianity* course is used in a number of dioceses and was largely developed before the Diocese of Bristol joined the partnership. The Formation year, however, has been built up by the ALMD and others locally. Its philosophy and rationale is spelt out in the *LLM Training & Formation Course Handbook* and linked clearly to the diocesan strategy:

'The Formation year therefore aims to equip and enable Licensed Lay Ministers in their call to have a vital and continuing role in growing

communities of disciples who respond to the knowledge of God's love in releasing their gifts to the whole of God's kingdom in a conspicuous and intentional way.'

25. The shape of the year is framed by an induction weekend and a retreat prior to admission and licensing. We spoke to a wide group of those who were four months in and those who had completed the whole year. Though the induction weekend had been especially daunting to some, it was clear that the rationale for this was appreciated and it contributed to a strong sense of community in the group and personal growth.
 26. There is a strong emphasis on theological reflection both in the assessments and in the style and content of the learning sessions. The handbook describes lay theologians as 'people who have developed the habit of theological reflection, firmly rooted in the practice of considering "Where is God?" in any given situation'. The students we met displayed a maturity and confidence in this habit.
 27. The staff team and diocesan leadership have discussed whether the *Common Awards* route would have advantages, not least in ensuring the quality and depth of theological formation. It was clear to us, however, that such a move would require a wholesale re-evaluation of the ethos and rationale of the programme. We wondered whether some of the students we met would have reached the point of offering for LLM if they had not had the opportunity of engaging in the *Exploring Christianity* course and gaining in confidence in both theological study and their vocational journey (in the group of Formation year and post-Formation year students that we met fewer than half began *Exploring Christianity* clear in their vocation).
- C.ii *The institution should offer, and periodically review, a set of programmes that will enable candidates to be prepared for their ministries and/or meet their learning needs.*
28. The Formation year is reviewed and modified by the ALMD and her team. They have mapped the national criteria for Reader ministry and in their annual review noted a gap in the area of mission – which has now been acted upon.
 29. The *Exploring Christianity* course is part of a regional partnership. There are six modules covered over the two years: Spirituality and Prayer, Exploring the Bible –New Testament, Questions of Faith, Reshaping the

Church, Exploring the Bible – Old Testament, and Challenging Choices (Ethics). This seems to cover the bases well, though perhaps consideration could be given to the place of inter-faith exploration (see Recommendation 2). The modules we examined or experienced were generally good (see section 4 below). It was clear that the staff would have welcomed a more effective way of reviewing and revising modules (we saw a number of examples of this; see B.iii above and Recommendation 3).

30. A consequence of the pattern of the three years is that training in preaching and leading worship comes very late in the cycle – not, in fact, until the final term. Whilst we can see the value of this for those growing in confidence, it is also the case that the LLMs in training are being asked to begin engaging in a public ministry before any substantial training.

Recommendation 4:

We recommend that the scheduling of training in preaching and leading worship be reviewed and serious consideration given to introducing it earlier in the year.

C.iii The academic and formational assessment methods should enable the institution to advise church leaders on the suitability of candidates for their ministry.

31. Each module of the *Exploring Christianity* course has an assignment with a choice of styles (experiential/reflective/academic). Those who will proceed to the LLM Formation year are required to complete an assignment (for some that may mean doing so later on or repeating the module).
32. During the Formation year there are Practical Applications that are assessed and involve a variety of forms of feedback. A theological reflection is submitted at the end of each term and after a four-week church placement. There are two assessed sermons.
33. The ALMD is able to draw on all of these assessment methods in advising the LLM Board, the Warden of Readers and the Bishop as to the suitability of candidates for admission and licensing. She and her fellow tutors also have considerable contact with the candidates over the Formation year.

<p>The review team has confidence with qualifications with regard to Criterion C, Curriculum for formation and education.</p>
--

SECTION THREE: MINISTERIAL DEVELOPMENT

D Community and Corporate Life

Reviewers will consider the institution's quality of common life. Is it a good place in which to live, work and study? How is community built across local training contexts and in 'dispersed' mode?

34. The institution is a good place to work and study and there is evidence of a good sense of community across the local training contexts.

D.i The institution should offer a clear statement of how it understands corporate life, reflected in its training for ministry and the working relationships between members.

35. Teaching sessions were observed for formation year students at Hillside House (evening session) and Yate (whole day) and *Exploring Christianity* students at an evening session at Bradley Stoke. There was good evidence of a mutually supportive, open atmosphere between students and tutors. Past and present formation year students said that they find the tutors very approachable. Time was given for refreshment breaks, to enable community life to grow. Tutors modelled good collaborative working relationships.

36. The *LLM Training and Formation Course Handbook* states that annual study days are offered through Trinity College, which provides an opportunity for all of the *Exploring Christianity* groups to come together.

37. The transition from *Exploring Christianity* to Formation year is aided by an Induction Weekend at the start of the Formation year. The ALMD explained that the whole purpose of this weekend is to build community. Comments from current and past formation year students showed that this is successful. However, some students expressed initial discomfort at the beginning of the induction weekend at the deeper level of sharing that was invited, which was not indicated on the agenda. The reviewers believe that it would benefit students on the Induction Weekend if their expectations of this initial session could be managed.

Recommendation 5

Students should be given information in advance of the induction weekend that will indicate in sufficient detail how the content is designed to build community to prepare them for the formation year experience.

D.ii There should be a clear statement of its understanding of issues of gender, ethnic grouping and disability and other matters of natural justice; its training, governance and community life should reflect this (see also I.v and J.ii).

38. Information in the *LLM Training and Formation Course Handbook* indicates an inclusive attitude to gender, ethnic grouping and disability. It states that a route is offered for candidates with special educational needs. The role description for *Exploring Christianity* tutors states that tutors should "follow Diocesan guidelines regarding equality, diversity and inclusion."

39. The reviewers observed excellent practice in catering for the needs of a visually impaired formation year student who expressed that he was highly satisfied with his experience. This student prepared and led worship at two sessions. The reviewers were unable to observe attitudes to different ethnic groupings as the student community was in that respect homogeneous. However, all groups observed were mixed in terms of social background and gender, and there was a clear sense of mutual respect and acceptance.

D.iii Does the institution have clear and well-managed policies for the safeguarding of children and vulnerable adults?

40. There is evidence that policies for safeguarding of children and vulnerable adults are clear and well managed.

41. The handbook states that LLMs are asked for an enhanced disclosure from the Disclosure and Barring Service. The volunteer agreement states that tutors will be supervised by the ALMD in their voluntary duties on the *Exploring Christianity* course. In the Annual Self Evaluation document for 2015, evidence is provided to show that the institution's policy and practice in the safeguarding of children and adults has been reviewed in the year against the nationally provided model and appropriate actions taken. (See also J.iii).

<p>The review team has confidence with regard to Criterion D, Community and corporate life.</p>
--

E Worship and training in public worship

Reviewers will look at whether the arrangements for common worship and the policies underlying them are satisfactory.

E.i The institution's policy and practice in corporate worship should reflect the tradition and liturgical inheritance of the wider church.

42. Students have opportunities to lead a variety of forms of worship in the context of the course. The reviewers observed students leading short acts of worship at the end of teaching sessions that they had devised themselves. Evidence of students leading public worship using authorised liturgies of the Church of England was limited to brief references in the course handbook.

Recommendation 6

There should be a review and a clear policy of how the course prepares students for the full range of liturgies of the Church of England.

E.ii There should be a policy on, and provision for, a balance of worship, including authorised and innovative forms, which recognises and equips candidates to work within the variety of practice within the sponsoring church.

43. The handbook mentions briefly that students will have experience of leading worship in their local context, overseen by their training incumbent (TI). The overview of the course structure indicates that liturgy and leading worship are components of the Formation year but no further detail is given. There is no evidence of a policy on the balance of authorised and innovative forms of worship.

E.iii Ministerial candidates should be effectively trained to plan, prepare and conduct public worship as appropriate for their ministry (lay or ordained), and they should receive critical and constructive comment from staff and peers.

44. Students are trained by their TIs to plan, prepare and conduct public worship as lay ministers, as stated in the course handbook. The 2015 Annual Self Evaluation (ASE) recognises the need to ensure that material provided to TIs prepares them sufficiently for their role.

45. There was limited evidence of guidelines on leading worship and no evidence of structured opportunities for staff and peers to give feedback on acts of worship devised by students. An action from the 2014 ASE was to revise the input and feedback form on leading worship, and such forms were devised. The 2015 ASE proposed that a briefing sheet was needed on the expectations of closing worship. There was no evidence for these forms being issued to students who prepared the closing worship at the training day at Yate.

Recommendation 7

Actions proposed on the 2015 Annual Self Evaluation relating to preparation and feedback on conducting worship should be reviewed in the 2016 Annual Self Evaluation.

E.iv The liturgical space should be adequate for its purpose.

46. The liturgical spaces that the reviewers visited were adequate for their purpose.

<p>The review team has confidence with qualifications with regard to Criterion E, Worship and training in public worship.</p>
--

F Ministerial, personal and spiritual formation

Reviewers will consider how well the institution helps learners in their ministerial, personal and spiritual formation and self-awareness, and in their understanding of the specific lay or ordained ministry to which they are called.

47. The review team found a well-developed approach to ministerial, personal and spiritual formation - by reviewing course content for the Formation year in the handbook, observing teaching sessions and talking to past and present students.

F.i The institution should enable candidates to be immersed in the traditions of their own church denomination and to gain an empathetic understanding of church and faith traditions other than their own.

48. Students are provided with good opportunity to engage in their own parish. The ALMD meets TIs to ensure they understand their role. The 2015 ASE states the intention to provide all TIs with the course handbook. There was evidence in student portfolios that the course provides documents for

structuring feedback on students' activities in their local context. There was little evidence of how students gain an understanding of other faith traditions (see B.iii above).

F.ii It should offer corporate and individual guidance for learners, including encouragement to seek confidential spiritual counsel and to maintain a regular private prayer life.

49. Students are encouraged to work with a mentor during the Formation year, as stated in the course handbook. Conversations with students showed that some of them also have spiritual directors but not all. The reviewers noted from the 2015 ASE that the diocesan contact for spiritual direction is to be invited to the Formation session for 2016.

50. Chaplains were present at the 'Ministry to the Bereaved' training day to offer confidential spiritual counsel if needed.

F.iii Its common life and the guidance offered should enable students to grow in Christian discipleship, in readiness to share their faith, and as theologically reflective practitioners, with a view to exercising a public role in ministry and engaging with the world.

51. The common life and guidance offered enable students to grow in Christian discipleship. This pervades the course material that the reviewers observed, especially as tutors give personal examples to illustrate their teaching material. Students are encouraged to be theologically reflective practitioners. Student portfolios contained regular theological reflections with tutor feedback.

F.iv The teaching and ministerial staff should model an appropriate pattern of spirituality, continued learning and reflection on practice.

52. The teaching staff are good role models for reflection on practice. This was observed as staff included stories from their own experience of ministry to enhance the teaching material. The ALMD had attended a conference on funerals, which provided relevant teaching material and was evidence of continued learning.

<p>The review team has confidence with regard to Criterion F, Ministerial, personal and spiritual formation.</p>

SECTION FOUR: EDUCATION AND TRAINING

G Teaching and learning: content, method and resources

Reviewers will consider the quality and effectiveness of teaching and learning activities, methods and resources.

53. The review team was impressed by the high quality and effectiveness of teaching and learning activities and the students were clearly happy.

G.i The units of teaching and learning should be well structured, with clear and appropriate aims.

54. The course handbook gives a good overview of the units of teaching and learning. Booklets of teaching material are produced for each module. The content is well structured and aims are clearly stated. Handouts for the formation sessions that reviewers observed were excellent with clear aims and a good layout. Additional useful practical material on funerals was also provided at the Ministry to the Bereaved training day.

G.ii There should be a proper balance between the academic, formational and practical aspects of training.

55. There is a good balance between academic, formational and practical aspects of training. The *Exploring Christianity* modules provide three options for assessment: more reflective, more experiential and more academic. The third year is primarily concerned with Formation, both in the class context and in the local church. TIs support the practical aspects of ministry by their oversight and assessment of practical tasks in the local context.

G.iii Learning programmes should be varied in format and method, with use of student experience, courses, seminars, tutorials, one-to-one, groups, placements and private study.

56. The learning programme is varied in format and method, as described in the course handbook. The review team saw a good range of teaching methods. Excellent use was made of small groups in a Formation year evening session with volunteers role-playing in a pastoral listening exercise. The format of an *Exploring Christianity* teaching session was less varied. Students had done preparatory reading and the entire session was based on discussion of the topics covered. This seemed appropriate for the particular group of students,

- who engaged and contributed to varying degrees. This may not be the case with all groups, so strategies need to be in place to involve and engage different types of students in terms of learning style, academic ability and personality type. The review team notes that the ALMD is keen that tutors are aware of different learning styles and some awareness training was given at the tutors' meeting in January 2016.
57. At the 'Ministry to the Bereaved' training day, it could be seen that staff valued students' experience and there was opportunity for them to share it in practical exercises and discussions. Further opportunity for exercising practical skills in a learning environment is provided by the placement in a local context, in which all formation year students participate.
58. In addition to study in group teaching sessions, private study is built into the programme. Tutors are also open to one-to-one discussions with students. One Formation year student explained how the tutor support had been extremely helpful when resubmitting an assessment in which he had been referred.
- G.iv There should be an appropriate learning environment, with adequate resources including library and information and communications technology.*
59. The learning environment and resources are good. Hillside House has good facilities for presentations and access to several small meeting rooms for group activity. Book boxes are provided at each venue. Information and communications technology is mainly in the form of email, which is used well to communicate with tutors, issue material to students, and give details of course events.
- G.v Staff should provide students with constructive formal and informal feedback assessment, against published assessment criteria, in terms of both academic progress and preparation for beginning public ministry.*
60. Students receive an assignment pack which explains the assessment process. Assessment criteria for *Exploring Christianity* modules are published and formal written feedback is provided in relation to the criteria. Moderation of assessment routinely takes place, as explained in the course handbook. The ASE for 2015 describes how this process is under review. This was also discussed at the tutors' meeting that the reviewers observed, which was attended by chair of the moderation panel. New terms of reference have now been produced.

61. The student portfolios hold copies of all formal feedback sheets. This provides a comprehensive record of student progress. For the Formation year, tasks are assessed as either Pass or Refer. Constructive feedback is given in all cases and where students are referred, they are given guidance to help them improve and resubmit the assessment. The portfolios also contain feedback and assessment sheets for TIs and others involved in providing feedback on practical activities in the local context.

The review team has confidence with regard to Criterion G, Teaching and learning, content, method and resources.

H Practical and pastoral theology

H.i The institution's learning structures and formational activity should integrate theory and practice and enable students to grow as theologically reflective practitioners in the context of the developing and diverse society in which they will minister.

62. The reviewers observed a good balance of theory and practice in the teaching sessions they observed and in conversation with students and the Bishop of Swindon. The handbook shows how the Formation year integrates three themes - leadership, pastoral and church. The blended learning model in the handbook shows how the range of Formation year components integrate to produce a rich and rounded learning experience which effectively combines pastoral theology and practice. Evidence of developing theologically reflective practitioners is provided in F.iii and F.iv.

The review team has confidence with regard to Criterion H, Practical and Pastoral theology.

SECTION FIVE: STAFF AND STUDENTS

Reviewers will consider the recruitment, expertise, resourcing, appraisal and development of staff.

I Teaching Staff

I.i The gender, lay/ordained and denominational balance of ministerial and teaching staff should model appropriate patterns of learning and of ministry and comply with denominational guidelines.

63. There is a good balance in gender, lay/ordained and churchmanship amongst the teaching staff. They include priests-in-charge, a curate, retired clergy and five LLMs. In addition, there is a member of the Bishop's staff, the ordained Warden of Readers and the ordained ALMD. The two Formation year tutors are a female ordained priest and a male LLM. The staff group is very diverse and from a variety of socio-economic backgrounds; however, they are all white Caucasian. This is reflective of ministry across the diocese. The tutors' variety of churchmanship reflects the breadth of those on the course, something which the students have recognised themselves. From discussion with the tutors' group it is clear that they feel valued as tutors, which adds to the overall positive sense that we gained when conducting this review.

The review team has confidence in regard to Criterion I, teaching staff.

J All staff

J.i Staff recruitment and selection procedures should be transparent, fair and consonant with the policies of the relevant partner bodies.

64. The tutors are mainly head-hunted by the ALMD, according to their skill set. For instance, the female Formation tutor had previous training and development delivery experience in the NHS, while the male tutor had Leadership Training experience. At other times senior diocesan staff will recommend possible tutors. On these occasions the ALMD will have a meeting with the potential tutor to ensure their suitability. Staff recruitment and selection procedures are not, therefore, transparent. Arguably because posts are not advertised there may be quality assurance concerns here and the possibility of attracting good calibre teachers from outside the diocese is

not even considered. That said, the current system is apparently working well with high staff morale and student enthusiasm for the course. The continuation of this, however, is very reliant upon the knowledge of the ALMD, occasionally supplemented by that of some senior diocesan staff.

J.ii Job descriptions, terms of service and reporting lines should be clear at the time of appointment and reviewed at regular intervals.

65. The tutors on the *Exploring Christianity* course are Volunteers. Their line manager is the ALMD. Tutors have to sign a volunteer agreement that sets out the terms of their volunteering to include the start date, place of volunteering, hours of availability and how to end the agreement.

66. They have a role description which includes a summary of their main duties and responsibilities including the establishment of a positive learning environment and the need to mark assignments (guidance is given for this). They also agree to support the processes in place to enable the exploration of a call to licensed ministry for their students and to fulfil the administrative requirements of the course, such as the submission of attendance registers at the end of each module. They sign to say that they will abide by the course objectives, the diocesan equal opportunities policy, its health and safety policy, its confidentiality and data protection policies and other selected parts from the staff handbook. The use of both the volunteer agreements and the role descriptions are compulsory in the diocese.

67. Paid staff members have written job descriptions and terms of employment which make clear the reporting lines they have to follow. Supervisions and annual appraisals ensure the opportunity for review at regular intervals.

J.iii There should be an effective programme for the continuing professional development of staff, including annual appraisals for all staff

68. As well as regular tutor meetings during which some training is given, there is an annual training day at Trinity College for the staff team. Regular meetings with the ALMD take place, during which any training needs are identified and acted upon.

69. Regular safeguarding training takes place in accordance with diocesan policy. However, it was noted that the staff handbook needs to be updated with recent Church of England developments in safeguarding policy.

Recommendation 8

We recommend that the staff handbook be updated to reflect the current policy of the Church of England relating to safeguarding. This can be found at <http://churchofengland.org/clergy-office-holders/child-protection-safeguarding.aspx>

- J.iv Staff should be sufficient in number and expertise, and resourced to fulfil their role adequately for the institution's and students' needs.*
70. Although the course is well structured, the tutors are allowed a certain amount of freedom to deliver the training using their own experiences, adding to the authenticity of the experience for the students. One description they made of themselves was: 'we're the local guides in the countryside they (the students) are walking through at present.'
71. Guest speakers are also identified and used as required to benefit the development of the students. These are specialists in their own fields, such as spiritual direction or pastoral care. Cross-deanery involvement also ensures that tutors from neighbouring deaneries are often involved in leading tuition groups, which is a useful way to expand the students' knowledge of the wider church in general.
72. In discussion with the review team, the tutors' group recognised that having a partially sighted student has caused them to consider and practise slightly different teaching styles from their norm. Reflection upon the different learning styles of their students has also been considered, as evidenced in the notes from previous tutors' meetings. The tutors' group as a whole is open to learning from more experienced colleagues as to how they can best deliver training to groups containing students with varying levels of competence and knowledge. This is a positive attribute which we appreciated.

The review team has confidence with regard to Criterion J, All staff.

K Students

Reviewers will examine procedures for student admission, welfare and support, appraisal and discipline.

K.i Policies on students' admission, welfare, complaints, discipline, assessment, reporting to sponsoring churches and arrangements for first appointments should be publicly available; and there should be evidence that they are applied.

73. With the exception of a complaints policy, appropriate policies were made available to the review team. A review of some students' files also provided evidence that appropriate policies were in place and being complied with surrounding the course admission and enrolment.
74. 'Having a mix of students helped me to express myself' was one comment in support of the admissions policy. All the students who participated in the discussion reflected that having a diverse group with different spiritualities added to the richness of the course.
75. In discussions with the students (all at different stages in the process, including Formation plus year), they were able to articulate what would happen in the event of a disciplinary issue being raised such as late submission of assignments or failure to attend tuition sessions (without good reason).
76. Given the lack of a written complaints policy, the group were able to explain what they would do in the event of having a complaint about an aspect of the course. This would entail speaking with the ALMD. However, they did accept that where any complaint would go from there (were it to remain unresolved) was unclear. A written complaints policy would be helpful to clarify matters.
77. Without exception the students stated they felt very well supported by the staff throughout the course. The group recognised that the staff showed they understood and empathised with some of the apprehension that many students felt on returning to writing assignments many years after their last studies. Some students described how they had had concerns and anxiety about standing up in front of people to preach but the way the staff team handled such fears and encouraged them was really appreciated.

78. Welfare is taken seriously, not least when it comes to placements during the Formation year. One student described their placement as ‘an amazing experience’. By the end of the course several students stated they were ready to be licensed and they ‘had the tools to cope with anything.’ These comments assure us that the policies are being applied.

Recommendation 9

We recommend that a written complaints policy be drafted and implemented to include a flow chart clearly showing how each stage of the complaint will be handled. Such a policy should also address the process in case of any appeal against marks allocated.

K.ii The institution’s decision-making structure should enable students to take an appropriate part in its governance.

79. There is currently one student representative from the Formation year on the LLM Council. This is a relatively new innovation (in the last year) and does allow for students, through their representative, to take an appropriate part in the governance of the institution. However, following discussion with past and present students, the review team concluded that this representation could be improved upon by the appointment of a second year student in addition to one from the Formation year. The advantage of this would be that there would be some continuity in representation for the following year. Also, currently the Formation year student is not invited to the third term’s meeting. This is because the students who will be recommended for licensing are discussed at this meeting and there is a desire for total confidentiality about this to be maintained.
80. We suggest that the student representative should be permitted to participate in this term’s meeting, only being asked to leave the meeting at the appropriate time when the licensing proposals are discussed.

Recommendation 10

We recommend the appointment of a second student (from the second year of the course) to the LLM Council. This will provide continuity of representation.

<p>The review team has confidence with qualifications with regard to Criterion K, Students.</p>
--

SECTION SIX: GOVERNANCE, MANAGEMENT AND FINANCE

L Organisation and governance

Reviewers will examine the effectiveness of the institution's governance structures and processes, recognising that these will be proportionate to the scale of the institution and will not apply identically to, say, a college and a diocesan course.

L.i The institution should have clear financial, administrative and management structures and an up-to-date governing document, and the governing body should be constituted in line with it.

81. Finances are fully integrated with the diocese and its structures. Administrative support is provided within the ministry development team and we saw good evidence of thorough systems of communication and planning. The equivalent to the governing body is probably the LLM Council, which has recently been reshaped to be a more effective critical friend to the training programme and, in particular, the Formation year. It would be useful to see this role written down somewhere, most obviously in the course handbook.

82. There is the potential for difficulty in the management and leadership structures, with alternative chains of command via the LLM Council (with the Bishop of Swindon and the Warden of Readers) and the ministry development department. This is only a *potential* difficulty as we saw nothing but a positive spirit of co-operation and mutual accountability – but, for the future, we would advise that this receives attention.

L.ii There should be evidence that the governing body recognises and discharges its role and legal duties in respect of stewardship of the assets; setting and safeguarding the vision, values, reputation and effectiveness of the institution; operational and staff oversight and support.

83. Concentrating on the second part of this, we were not able to witness the LLM Council in operation but gather that it gives about a third of its time to reviewing the course. The ALMD reports to each meeting and feedback is given on every session.

L.iii It should have the mix of skills and experience appropriate to its role; there should be a clear understanding of the respective roles of trustees and

staff, with job descriptions for key officers and induction for new trustees; and ongoing training needs should be met.

84. The LLM Council consists of the Bishop of Swindon, the warden of Readers, the seven subwardens and – since September – a member of the student body. If the Council has the role of ‘critical friend’ then perhaps an obvious broadening of skills and experience would be in the field of education (see Recommendation 1 above).

L.iv There should be evidence of a structured contribution made by all community members - teaching staff, ancillary staff, the student body and individuals - so that they play an effective role in decision-making.

85. This clearly needs time to be tested as a model but we were surprised to learn that the student representative would not be attending one of the three termly meetings (see K.ii above).

L.v The institution’s audited annual reports should be produced in good time and filed with the Charity Commission/Companies House as appropriate.

86. Not applicable.

<p>The review team has confidence with regard to Criterion L, Organisation and governance.</p>

M Business planning and risk management

Reviewers will look at evidence for the existence and implementation of the institution’s strategic policies. Subject to considerations of scale, as at section L:

M.i There should be a regularly-updated long-term strategy document agreed by the trustees and, in line with it, a business plan covering 3-5 years which identifies short and medium term aims and objectives and identifies how the institution intends to meet them.

87. The course operates within the strategy adopted by the whole diocese. The *Releasing the Energy* strategy shaped the patterns of ministry and ministry development in the diocese and provides much of the rationale for the Formation year. But a new strategy – *Creating Connections* - is currently being implemented. This commits the diocese to:

- *Increase the number, quality and diversity of new clergy*
- *Improve the way clergy are trained, challenged and supported*
- *Sustain a stable base of stipendiary clergy, while creating opportunities for development of new ministries*

88. There is no mention of the role of LLMs but they are presumably included in the following statement:

‘Our ministers help all God’s people to “grow up in Christ” to be disciples in the world: they set vision, get us working together and use their gifts to release our energy.’

89. As this strategy is rolled out, we would urge the LLM Council and the ministry development department to consider the future shape of licensed lay ministry in the diocese.

M. ii Annual budgets should be prepared in line with the business plan.

90. Budget-making processes are set within a sense of realism about overstretched diocesan resources. Though the appointment of an Adviser for Lay Ministry Development was made when the role had previously been cut – and therefore represented an increase in diocesan provision – it was not clear to us that LLM training is generously funded. Candidates pay their own course fees (or their sending churches do) for either the Exploring Christianity route or more expensive pathways (such as the Certificate in Theology at Trinity) up to the point of discernment. Once candidates have been formally recommended for training, their course fees are funded centrally. This means that LLMs whose style of lay theology is more academic would have to fund the initial cost of training themselves. We think it would be helpful if the costs of training LLMs were more explicit.

Recommendation 11

We recommend that the cost of training an LLM be calculated and comparisons made with other dioceses.

M.iii There should be an effective risk assessment, review and management process, which should include physical (e.g. health & safety and fire), financial, business and reputational risks.

91. While this is largely a matter for the whole diocese and diocesan office – and therefore that the course is in a protected position in this respect - we were conscious that the small size and staffing of the course leaves it vulnerable to one particular and huge risk, that of losing its key staff member.

Recommendation 11

We recommend that the LLM Council conduct a risk assessment for the course with particular regard to future staffing and funding.

The review team has confidence with qualifications with regard to Criterion M, Business planning and risk management.

N Financial policies

Reviewers will consider the effectiveness of day-to-day operating processes:

- N.i The institution should have policies to control and manage investments, expenditure and borrowing, and the annual report and accounts should contain an appropriate reserves policy.*
- N.ii Management accounts showing performance against budget should be produced at least quarterly and reviewed regularly by the trustees.*
- N.iii The institution should consider its sources of income and have strategies to identify and raise the funds it needs.*
- N.iv The institution should have adequate financial controls aimed at minimising waste and loss, and should be appropriately advised on tax-efficiency.*
92. Financial policies for the course are the responsibility of the Diocesan Board of Finance (of which it is a part). We did not see it as our role to inspect the DBF but saw evidence of appropriate financial policies.

The review team has confidence with regard to Criterion N, Financial policies.

O Statutory and operating policies

- O.i Proper books of account should be kept, with computerised data regularly backed up and stored offsite.*

O.ii Bank mandates should be up to date, with appropriate authority levels.

93. These are the responsibility of the Diocesan Board of Finance (of which the course is a part). We did not see it as our role to inspect the DBF but are assured by the judgment of the auditors in the annual report.

The review team has confidence with regard to Criterion O, Statutory and operating policies.

P Accommodation

P.i The i) public, ii) teaching and iii) provided private living accommodation should be fit for purpose and suited to students' needs, with an ongoing maintenance programme and forward planning for future needs.

94. *Exploring Christianity* groups use a variety of locations, often church halls. We attended two Formation year sessions: an evening one at the diocesan office (which was well equipped and spacious) and a daytime one in a church described as 'freezing'. Residential accommodation used includes the Marist Sisters Retreat Centre, Mympsfield, and the Abbey House, Glastonbury.

95. No concern was raised about the accommodation; the residential experiences were much appreciated.

P.ii There should be adequate provision for the needs of disabled students.

96. The course staff demonstrated a sensitivity to the needs of disabled students. The diocesan office is modern and is suitably equipped.

The review team has confidence with regard to Criterion P, Accommodation.

CONCLUSION

Overall outcome: The review team has confidence with qualifications in the Bristol Diocesan LLM Training and Formation Course for preparing candidates for licensed lay ministry.

LIST OF RECOMMENDATIONS

Recommendation 1

We recommend that the LLM Council look to appoint someone from the higher or further education sector to provide advice and assistance when reviewing the course.

Recommendation 2

We recommend that the course consider strengthening the inter-faith content of the curriculum.

Recommendation 3

We recommend that the LLM Council considers how to press for clarity of purpose in the partnership and its procedures for curriculum review.

Recommendation 4

We recommend that the scheduling of training in preaching and leading worship be reviewed and serious consideration given to introducing it earlier in the year.

Recommendation 5

Students should be given information in advance of the induction weekend that will indicate in sufficient detail how the content is designed to build community to prepare them for the formation year experience.

Recommendation 6

There should be a review and a clear policy of how the course prepares students for the full range of liturgies of the Church of England.

Recommendation 7

Actions proposed on the 2015 Annual Self Evaluation relating to preparation and feedback on conducting worship should be reviewed in the 2016 Annual Self Evaluation.

Recommendation 8

We recommend that the staff handbook be updated to reflect the current policy of the Church of England relating to safeguarding. This can be

found at <http://churchofengland.org/clergy-office-holders/child-protection-safeguarding.aspx>

Recommendation 9

We recommend that a written complaints policy be drafted and implemented to include a flow chart clearly showing how each stage of the complaint will be handled. Such a policy should also address the process in case of any appeal against marks allocated.

Recommendation 10

We recommend the appointment of a second student (from the second year of the course) to the LLM Council. This will provide continuity of representation.

Recommendation 11

We recommend that the cost of training an LLM be calculated and comparisons made with other dioceses.

Recommendation 12

We recommend that the LLM Council conduct a risk assessment for the course with particular regard to future staffing and funding.