

Quality in Formation Panel

Follow-up Inspection Report

Eastern Region Ministry Course
Norwich Diocesan Ministry Course
St Edmundsbury and Ipswich
Ministry Course

June 2013

**Ministry Division
Church House
Great Smith Street
London SW1P 3AZ
Tel: 020 7898 1413
Fax: 020 7898 1421**

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Norwich Diocesan Ministry Course
St Edmundsbury and Ipswich Diocesan Ministry Course**

**Senior Inspector's Report on the Action Plan and subsequent response
from the ERM Course to the Recommendations of the November 2011
Report of the Inspectors**

June 2013

INTRODUCTION

The Course provided initially an Action Plan on the Report and then, subsequently a full statement of their response in May 2013, which was fully discussed by the Senior Inspector with the Principal on May 29th 2013. In what follows the Inspectors Recommendations appear in **bold type**, the Course's initial action' points in *italics*, and the further report from the Course of May 2013 in normal type. The Course also provided the ERM and Reader Training Document, a Draft Strategy Group Report dated 30th May 2013, and the Risk assessment grid, each of which the Senior Inspector has had the opportunity to read. His comments on the action taken following the inspection including the Strategy Group Report are in ***bold italics***.

Recommendation 1

We recommend that the three Course Principals and the Chairmen of their Governing bodies continue their discussions with the Regional Bishops and through the Chairs of the relevant Methodist Districts within the Methodist Church to investigate whether and when a move to a single Course for the whole region would be practicable, efficient and prudent and what its relationship should be to the Regional Training Partnership.

Action Plan

During 2012-13 these discussions will proceed so that the best possible regional training arrangements can be in place for the start of the academic year 2013-14 when new validation arrangements will also be in place. The three course principals are all members of the E RTP steering group and this provides a conduit for that organisation to be involved in these discussion.

Principal's comments

The St Edmundsbury and Ipswich Diocesan Review, carried out during 2012, recommended that ERM be responsible for the training of those formerly designated OLM's as from August 2012. This transition has now been completed and all such students have been integrated into ERM. As such there

is no longer a DMC Course Principal and the DMC has now closed. The Norwich Diocesan Review has made a similar recommendation from August 2013 which means that ERMC will be responsible for those OLM's from then on. Again NDMC will close and there will be no NDMC Principal from that date. Accordingly from August 2013, there will be one single regional course as far as ordination training is concerned with the one Principal. There is also now only one Governance structure for the oversight of ordination training.

In October 2012, the ERMC Council set up a Strategic Review process so that ERMC student numbers, staffing, finance and curriculum might be better integrated in terms of our future planning. That report which accompanies this document indicates ways in which staffing, since the Inspection, has changed and how ERMC has responded.

The conclusions of the Fruitful Field report adopted by the Methodist conference in July 2012 means that ERMC is no longer a course to which student ministers will be sent and our last student ministers are to be stationed in August 2013. We remain alert to the possibility of being asked to contribute to the new regional Methodist training structures when they come into being. There are plans within the Cambridge Theological Federation to offer a "mixed-mode" pathway for ministerial preparation which may allow ERMC to draw in ecumenical partners to our weekend teaching.

We continue to relate to the ERTTP although that structure has been slimmed down. We also continue to work with the Lincoln School of Theology who have required exceptional validation arrangements for two years.

We believe that this recommendation has been met in full. With the advent of Common Awards in 2014, ERMC continues to be in substantial negotiations with the regional dioceses with regard to partnerships in reader training. Dioceses will continue to have their own reader training officers and structures but these will increasingly work in partnership with ERMC which is to the benefit of all concerned and is financially beneficial to ERMC. A paper to that effect is attached to this report. Those officers will attend ERMC staff meetings.

Inspectors

The recommendation has been met in full and remarkably quickly and represents a very major change. The Course and all involved are to be warmly commended on this outcome.

Recommendation 2

We recommend that the balance in the weekends between core subjects and special topics be reviewed to give more space to core subjects.

Action Plan

The regional staff meeting will review the three year cycle of weekend themes by March 2013 in response to this recommendation and in time to implement changes for 2013-14 when new validation arrangements may well necessitate a wider review of what is taught at weekends

Principal's comments

We understand that this recommendation came in response to Inspection visits where the staff team agree that the material presented as part of a wider ministerial theme was not as robust as it might have been. With the advent of common awards now scheduled for 2014, we have delayed a review of weekend themes as we expect that common awards will involve a major re-evaluation of curriculum and timetable. The planning for 2014-15 will begin at a regional staff residential in July 2013. We do intend to ensure that the new style of weekends continues to contain some robust theological work and more integrated teaching of core subjects. Inspectors may be pleased to know that the Theodicy optional session in Further Christian Doctrine is now a core session.

We are particularly minded to use this opportunity to improve the focus in the whole curriculum on ministerial preparation, Anglican identity and spirituality. The right and proper focus on mission and world faiths will continue but we recognise more time needs to be spent on these other issues.

Inspectors

Delaying the full review until now to prepare for the advent of the Common Awards seems reasonable, and the decision to give the theodicy session core status meets one of the Inspectors' concerns. It will be for the next inspection to examine the overall weekend programme to see if all our concerns have been met.

Recommendation 3

We recommend the balance of authorised and innovative forms of worship at residential weekends should be reviewed to give greater emphasis on authorised forms and, for Anglican candidates, to prepare them to meet the requirements of Canon Law in daily worship.

Action Plan

The Regional staff meeting has already made changes to the worship pattern for the forthcoming summer school in 2012 in the light of this recommendation. That meeting will also be constructing a pattern for residential worship in the year 2012-13 which ensures that, to quote a current student, the centre of gravity of

the worship of the courses re-focuses so that it can give greater emphasis to inhabiting a more formally liturgical tradition of worship. There will be an on-going review of this during 2012-13 including increasing the teaching on worship to the residential community.

Principal's comments

The whole community, in staff and student forums, has done a great deal of thinking and responding to this recommendation and there has been a shift in the centre of gravity of worship so that greater emphasis is now given on inhabiting a more formally liturgical tradition of worship. We still contend that there needs to be space on ERMC for observing students leading acts of public worship as well as participating in services that are more akin to the daily offices and we still defend a sense that we need to do more of the former than the latter. Nevertheless, from Summer School 2012, we took immediate measures to increase the number of common worship services, to balance the use of powerpoint with the use of books, and to introduce teaching in summer school and at residenceals on inhabiting liturgical practice, as well as carefully revising our written guidance. In 2013, there will be an even fuller session at our summer school on this. In a recent ERMC programme review committee, we had a very useful discussion on the importance of listening to one another in worship, to learn from the pace and tone set by the leader and we intend to develop this at our summer school which is the best place to form such habits. It remains the case that at residenceal weekends, there is only one act of worship (Saturday evening) where groups are freer to construct the rite. All the others are held within the authorised rites of Common Worship, the BCP, the Methodist Worship Book and Celebrating Common Prayer. Given that a significant number of our ordinands come from Anglican churches which seem unused to formal liturgy, we think that this worship pattern helps to locate them within the wider tradition whilst allowing them to see the rich allowable diversity which these rites have given to the church.

Inspectors

This new balance between the formal and the informal seems excellent and goes a long way to meeting the Inspectors' concerns. However the description of 'Anglican churches which seem unused to formal liturgy' inevitably raises the question of what makes them Anglican.

Recommendation 4

We recommend that the ERMC and the St Edmundsbury and Ipswich Course should consider the establishing of a single centre for training within the Diocese.

Action Plan

ERMC and EIDMC will re-visit and examine the possibility of a teaching centre in the light of financial and personnel issues and the future shape of training within the St Edmundsbury and Ipswich Diocese within the next three months as we plan for the new academic year 2012-13. There will be a further review in the early summer of 2013 in order to see what is feasible for 2013-14.

Principal's comments

The review by the St Edmundsbury and Ipswich Diocese of training did not in itself recommend a teaching centre within the Diocese because of the geographical constraints within which the Diocese has to grapple. The discussions about Common Awards for readers and ordinands from 2014 confirm that the Diocese wishes to use the Adobe connect mode of learning for its readers but that it has asked ERMC to research the possibility of a centre in Cambridge as part of the Federation. However, if this does not come to fruition, ERMC will look again at the locations of its centre based teaching which may include a centre in Bury St Edmunds. As the attached paper on Common Awards outlines, ERMC does not possess the resources to sustain more than three centres at most but we constantly monitor where such centres might be best located.

Inspectors

We recognised the geographical constraints, although the possibility of a single centre in the Diocese of St Edmundsbury and Ipswich was mentioned by a senior member of the Diocesan staff. That the matter is still being actively investigated is an acceptable outcome at this stage.

Recommendation 5

We recommend continued and vigorous use of appraisal, evaluation and peer-review processes to ensure its best standards apply in all teaching sessions.

Action Plan

All three course staffs will continue to be peer-reviewed and appraised in terms of their teaching and this cycle will be documented by keeping a copy of the peer-review within the relevant staff members file. The process will continue to be overseen by the three course Principals.

Principal's comments

All core staff and on-going sessional staff will continue to be peer-reviewed and appraised in terms of their teaching in compliance with the Cambridge Theological Federation procedures and this cycle will be documented by keeping a copy of the peer-review within the relevant staff members file. All core staff and all sessional teachers have been reviewed during 2012-13 and those reviews have fed into staff appraisals.

Inspectors

Possibly the critical word in the recommendation was 'vigorous'. If that applies to the Action Plan and Principal's comments then this is a satisfactory outcome.

Recommendation 6

We recommend that enhanced CRB checks on ERM staff should be checked and, if not in place, should be instituted immediately and evidence on the right to work in UK for foreign nationals on the staff should be available.

Action Plan

The ERM Finance Group will oversee this process for the ERM staff and copies of the CRB check will be kept on file. For those who do not have a diocesan connection, the St Edmundsbury and Ipswich Diocese has agreed, for a small fee, to act as counter signatory. This process will be completed by the end of 2012.

Principal's comments

We are grateful to the St Edmundsbury and Ipswich Diocese for providing this service for those lay ERM staff who are not licensed office-holders in a Diocese. This process is now complete.

Inspectors

This is a satisfactory outcome. Obviously the process has to be repeated from time to time in accordance with the current rules.

Recommendation 7

We recommend that the Councils of the ERM and its related diocesan courses should review their membership and their committees'

membership and terms of reference to ensure that financially and managerially astute advice can be independently offered.

Action Plan

The ERM Council began to make changes in February 2012 to its finance group that is now chaired by a trustee and are now looking to boost membership with the expertise of a former student involved in financial matters. Further work will be done on this in June 2012 when the Council will review its own membership. The membership and terms of reference of the committee structures of the two diocesan courses operate under DBF governance and statutes are therefore are not able to be altered to the same extent as the ERM Council.

Principal's comments

The ERM Council decided in October 2012 to set up a strategic review process. This cohered around the existing finance group augmenting its membership for strategic planning meetings. The Vice Chair of the Council has chaired the strategy group which has focused on the wider vision work while the finance group, now chaired by a member of the ERM Council, meets after it. The latter's work is now much more focused on the nuts and bolts of financial movements. The report of the Strategy group is to come to the June 2013 council meeting and will include business planning for the years 2014-15 and 2015-16.

With the integration of OLM candidates, the ministry courses from Norwich and St Edmundsbury & Ipswich have now closed although training for lay ministries continues to be overseen within Diocesan structures. It has been part of the Strategy Group's work that the ERM Principal has had a number of meetings with regional dioceses about new financial arrangements for 2014 onwards. Representation from Diocesan reader training will be held at the ERM staff meeting level and the ERM Council will be considering how best to incorporate these arrangements at Governance level.

Inspectors

The Draft Strategy Group Report and the possible new involvement with reader training across the region shows a degree of financial attention that is commendable. It does appear that significant steps have been taken to address this recommendation.

Recommendation 8

We recommend that financial risks to the institution should be carefully evaluated and regularly updated in the risk register.

Action Plan

The ERM Council Finance Group will do this so that financial risks are part of the annual review of risks required at each audit, in other words, this will take place for the audit to take place in September 2012.

Principal's comments

The finance group is now doing this and an updated risk register was agreed at a meeting in May 2013 and will be presented to the ERM Council in June 2013. Risk management has also been one of the motivations for the strategic review. A copy of the Risk Assessment grid is attached.

Inspectors

The new Risk Assessment grid looks realistic and as long as it is regularly and thoroughly reviewed and updated this recommendation has been met.

Recommendation 9

We recommend the ERM Council business plan should be urgently updated to take account of the likely future student numbers and the need to ensure the viability of the Course over the period of study of students starting this academic year.

Action Plan

The ERM Council Finance Group has continued to work on updating the current ERM Council business plan and since the inspection has submitted three revised budget forecasts to the ERM Council for 2012-13 based on three student number outcomes. These have been based on further savings in staff expenditure, new income from Reader training in St Edmundsbury Diocese and negotiating a fair settlement with regard to Federation fees. Anticipated deficits for 2012-13 are therefore already significantly reduced from those presented to the November 2011 Council meeting. The Finance Group will continue to provide for the ERM Council a business plan for the current and forthcoming year in the light of significant uncertainties at national church level as to what income ERM Council can reasonably expect from student numbers. The Finance Group will continue to report to the ERM Council three times a year. The Council is currently satisfied that the Course remains viable.

Principal's comments

The strategic review group has had this issue at the heart of its work and after canvassing a wide range of options, has been exploring the two most promising possibilities. The first is whether ERM Council, with diocesan support, will be able to

stand as an independent institution and it looks, initially, as if money earned from reader training and small economies afforded by the departure of a half-time staff member may allow that to happen. We have been involved in significant regional conversations, drawn in our Alumni and sought the specialist advice of an ex-President of the Methodist Conference. A second option is reflected in discussions that have been taking place with Westcott House to explore wider partnerships. This is revolving at the moment around issues of premises and of mixed mode training. However, it is likely that the report of the group will indicate that, should ERMC find itself unable to be sustained independently, then we would seek a merger with Westcott House. The report will outline what steps will need to be taken for this to occur.

In the light of this, we are confident that our business planning for the years 2013-16 will allow us to sustain training for those sent to us, certainly with an independent ERMC until 2016. During this time, we shall continue to pursue conversations with Westcott House. The main pressures financially are with the increase in Federation fees following the withdrawal of HEFCE money but we are also in conversation with the Federation as to how those fee increases could be kept to a minimum.

A draft version of the strategic review is enclosed but please note that the Council will not consider it until June 14th 2013.

Inspectors

It is evident from the Draft Strategy Group Report and the Risk Assessment grid shows that this issue is being carefully and sensibly addressed as the options identified in the Principal's comments above show. The Council's consideration of these documents and options will be critical for the future of the Course.

Recommendation 10

We recommend that the financial limits on cheques to be signed should be urgently reviewed by the Council and that above a certain limit a Trustee's signature should be required.

Action Plan

The ERMC Council has reviewed this matter through its Finance Group and is satisfied that given the routine nature of the vast majority of ERMC expenditure, the current cheque signatory rules of two for amounts over £750 are satisfactory. They have however agreed that any un-budgeted and therefore exceptional expenditure over £750 must have the chair of Council's signature on the cheque.

Principal's comments

The Principal repeated this conclusion.

Inspectors

This appears to be a reasonable outcome.

Recommendation 11

We recommend that the Trustees of ERMC should give careful consideration to their reserves policy to ensure that the institution has sufficient reserves as they deem appropriate for the nature and size of the institution and, if necessary, to take action to bring those reserves to the required level.

Action Plan

The ERMC Finance Group are drafting an updated reserves policy which will come to the Council meeting in June. We note that three months reserves were held at the end of 2010-11 and that the reduction in anticipated deficit for 2012-13 will place less pressure on the reserves.

Principal's comments

The ERMC Council has agreed a new reserves policy.

“ERMC prepares annually a budget reflecting its day to day operations. Income is largely derived from stable sources being Ministry Division and other partners. It is anticipated that reasonable notice of withdrawal or a change to funding will be received.

In the light of this, the Trustees are satisfied that ERMC can operate with the equivalent of two months' worth of expenditure as a reserve. However, over the longer term, it is desirable to move to three months, provided that there is no detrimental effect on the running of the course. This would not provide against a change in Ministry Division funding arrangements, but would give Trustees the opportunity to consider and respond to any such change. It is not considered necessary or appropriate to hold reserves against such changes.

By specific decision of the Trustees additional reserves to meet future needs/projects may be established from time to time.

The reserves will be monitored annually by reference to the annual reports and accounts and adjusted as necessary through the budget for the ensuing year. This Reserves Policy will be reviewed by the Trustees every 6 months for the next 3 years.”

Inspectors

The Draft Strategy Report notes that the Council's policy of working towards three months reserves should be met in 2014-15, but will not be met in 2015-16. This is understandable given the uncertainties of various developments both locally and nationally, but will clearly need to be addressed in the future, especially if their worst case scenario comes to pass.

Conclusion

The Course has addressed the Inspectors' recommendations with thoroughness and care and has taken some major steps, particularly in so quickly becoming one Course. This has been against the background of all the other major changes that are being made in the whole area of ministerial formation both nationally and regionally, and the Council and staff are to be much commended for responding in such a way at a particularly demanding time. No theological training institution can be wholly confident of the future, but ERMC's response should make it more confident. I have no hesitation in warmly congratulating them on the progress they have made.

**The Reverend Canon Dr Robert Reiss
Senior Inspector**

25 June 2013