



THE CHURCH
OF ENGLAND

Ministry Council

Periodic External Review Report

St Stephen's House, Oxford

November 2014 - January 2015

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GLOSSARY

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|-----------------|---|
| <i>BAP</i> | <i>Bishops' Advisory Panel</i> |
| <i>House</i> | <i>refers to St Stephen's House</i> |
| <i>DDO</i> | <i>Diocesan Director of Ordinands</i> |
| <i>F&GP</i> | <i>Finances and General Purposes Committee</i> |
| <i>OPTET</i> | <i>Oxford Partnership in Theological Education and Training</i> |
| <i>OU</i> | <i>Oxford University</i> |
| <i>PER</i> | <i>Periodic External Review</i> |
| <i>PPH</i> | <i>Permanent Private Hall</i> |
| <i>SSH</i> | <i>St Stephen's House</i> |
| <i>SJE</i> | <i>St John the Evangelist Church</i> |
| <i>TEI</i> | <i>Theological Education Institution</i> |

LIST OF REVIEWERS

Revd Canon Dr Dennis Stamps, (Senior Reviewer) Rector, Parish of Harpenden and formerly Director of Ministry, Diocese of St Albans

Revd David Arnold, Vicar of St Paul, Adlington and Assistant Director of Ordinands, Diocese of Blackburn

Revd Professor Frank Berry, NSM Priest at St Mary and St Anne Moseley, Birmingham and Honorary Professor of Chemistry, The University of Birmingham

Mrs Deborah de Haes, Management consultant specialising in organisational design and governance, and team development

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 ST STEPHEN'S HOUSE, OXFORD

November 2014 - January 2015

SUMMARY

Introduction

St Stephen's House was founded in 1876 in order to provide ministerial training in the catholic tradition of the Church of England. For the House's first years, it was situated near the centre of Oxford. In 1980 it moved to the current site, formerly the mother-house of the Society of St John the Evangelist (also known as the Cowley Fathers). In 2003 the House became a Permanent Private Hall (PPH) of the University of Oxford (OU). In addition, in 2014 it was validated as a Theological Education Institution (TEI) for the Common Awards with Durham University.

At the time of the inspection there were 37 ordinands (34 men and 3 women). In addition, as a PPH it admitted 47 other independent students resident in the House.

The review team concluded that St Stephen's House is fit for purpose for preparing ordinands for ordained and licensed ministry in the Church of England. It delivers quality theological education, ministerial training, and formation for ministry. This review detected improvements from the previous inspection in 2008. Though there are a number of recommendations in the report, the majority of these are for making good practice better rather than highlighting substantive problems.

Summary of outcomes

| CRITERIA | OUTCOME |
|---|------------|
| A. Aims, objectives and evaluation of the institution | Confidence |
| B Relationships with other institutions | Confidence |
| C Curriculum for formation and education | Confidence |
| D Community and corporate life | Confidence |
| E Worship and training in public worship | Confidence |

| | |
|---|--------------------------------|
| 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 with qualifications |
| K Students | Confidence |
| L Governance, management, constitution and organisation | Confidence |
| M Business planning and risk management | Confidence with qualifications |
| N Financial policies and cost-effectiveness | Confidence with Qualifications |
| O Reserves policy and statutory liabilities | Confidence |
| P Accommodation | Confidence with qualifications |
| Overall Outcome | Confidence |

General observations

The review team conclusion is that we have Confidence in St Stephen's House, Oxford, for preparing students for ordained ministry in the Church of England.

Strengths

- A theological college with a clear and distinctive identity which informs all aspects of its life
- A community of worship and prayer which enables spiritual formation for life and ministry
- Tutor Groups that engage with projects that facilitate development of mission and theological reflection to a high standard
- Effective processes for enabling integration of academic, ministry theory and skills
- A very good standard of accommodation for single students and for the general life of the community

- A clear sense of purpose and innovative approaches to raising funds from alternative sources to support its core purpose

Areas for attention

- Ensuring the Self-Evaluation process is fully embedded in the life and practice of the House
- Development of a formal appraisal process with written records for support staff
- Regular review of job descriptions for all staff as part of the appraisal system
- Developing an operational plan to complement its good business plan
- Improve the timing of the approval of the budget and the presentation of management and financial accounts to aid good decision-making
- A reserves policy is included in the statutory accounts
- Consider plans for improving married accommodation

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**.

FULL REPORT

INTRODUCTION

1. St Stephen's House (SSH) was founded in 1876 by members of the Tractarian movement in order to provide ministerial training in the catholic tradition of the Church of England. The House's principal founder was Edward King, then Regius Professor of Pastoral Theology in the University of Oxford, and later Bishop of Lincoln. For the House's first years, it was situated near the centre of Oxford. From 1919, the House had a site in Norham Gardens, near to the University Parks. In 1980 it moved to the current site, formerly the mother-house of the Society of St John the Evangelist (also known as the Cowley Fathers). In 2003 the House became a Permanent Private Hall of the University of Oxford. In 2014 it was also validated as a Theological Education Institution for the Common Awards with Durham University.
2. The House is situated near Oxford city centre close to many of the University colleges and faculty buildings. Since 1994 it has been a core member of Oxford Partnership in Theological Education and Training (OPTET) with other theological colleges in and around Oxford. The House participates fully in the OPTET life and structures and values the benefits it gains from this even though it adds an additional layer of involvement and commitment for staff and students. The demise of the Oxford University BTh means one of the key impetuses for cooperation is going, but it is hoped that cooperation with regard to Durham University Common Awards will provide a new impetus for continued cooperation.
3. At the time of the inspection there were 37 ordinands (34 men and 3 women). Of the 37 ordinands, 16 were married, 2 were civilly partnered and 19 were single. Nineteen ordinands were under 30 years of age. In addition, as a PPH there were 47 other independent students resident in the House; 18 are PGCE students and 28 are postgraduates with one independent student taking the BA. There are 4.5 academic tutors complemented by 3 visiting tutors and 6 research fellows. The support staff includes the bursar with eight others, a librarian, a maintenance crew of two, along with contracted cleaners and catering staff.
4. Academic pathways for training are offered through the University of Oxford and Durham University. Oxford awards presently offered are the three year BA or Final Honours School in Theology (for those under 32 years of age), the two year Postgraduate diploma in theology, and for theology graduates, the two year MTh

in Applied Theology. The two main awards from Common Awards offered are the three year BA in Theology, Ministry and Mission and the two year Diploma in Theology, Ministry and Mission. Other Common Awards and Oxford University postgraduate awards are available if appropriate for training. This set of awards suits a wide range of academic ability and learning styles. The House is also continuing to provide training for those completing awards that are no longer being offered: the Oxford BTh, CTh, CTPS and DTPS.

5. The Periodic External Review (PER) was set against the continuing back drop of changes in theological education. The Durham University Common Awards were introduced in the autumn of 2014. The House is very pleased that as an Oxford University PPH, it is able to offer these. The staff are very positive about the opportunities the Common Awards presents for ordinands and for enabling a good integrated training and formation programme by the House in its tradition. However, it has been a challenge to get these awards implemented especially as there have been a number of administrative challenges with the programme. In addition, the Archbishops' Council has recently released its report, Resourcing Ministerial Education, which will have an unknown impact in the coming year(s) on theological colleges and their provision for ministerial training. Also, the University of Oxford Faculty of Theology and Religion is reviewing its involvement in ordination training following the introduction of Common Awards which provides another possible unknown set of variables which may impact the House.
6. Given recent developments in the Church of England, specifically the vote to consecrate women as bishops, it is important to comment on the tradition in which the House stands. The Church of England is committed to the statements of hospitality to those Anglicans who do not accept the ordination of women as stated in such documents as the Bonds of Peace (1993) and the recent Statement of the Five Guiding Principles related to the legislation for women bishops. With this commitment there will be a need for a theological college in the catholic tradition like SSH. As one ordinand who does not accept the ordination of women stated, 'Where else could I train where I would be positively welcome'? It was the experience of the review team that the House, given its traditional catholic ethos, exercises a deliberate practice of hospitality to all traditions. Amongst the ordinands were women, evangelicals, as well as liberal Anglo-Catholics who accepted women's ordination—all of whom spoke favourably of their experience training at SSH. It was not a college pre-occupied with one issue, but a community at ease and comfortable with embracing a variety of perspectives and traditions on numerous issues whilst situated clearly within a distinct theological and spiritual tradition.

7. The review process began with the senior reviewer meeting with the Principal for a preliminary meeting on 9th October, 2014. The review was conducted with two separate visits, 5th – 7th November 2014 and 18th – 21st January 2015.
8. The review process included correspondence from a number of Bishops who have received ordinands from SSH in recent years replying to an email requesting their opinion of the quality of training at SSH. In response to a general email, we received several replies from DDOs and from the regional CME Officers. In addition, we received correspondence from numerous former students who recently trained at SSH. There was also a meeting with placement and sermon supervisors.
9. During our two visits members of the review team attended the following: all of the worship during the week, Tutor Group meetings, numerous course lectures at the House. Members of the team also had interviews or conversations with the Principal, the Vice-Principal, each of the core tutorial staff members individually, the student Common Room Committee, representative groups of students, and several individual students who requested a meeting. We met with the academic tutorial staff without the Principal. We met with the Bursar regarding the range of matters under her remit. Nearly all the support staff were interviewed individually. We attended a meeting of the Finance and General Purposes Committee, and a meeting of the House Council along with a separate meeting with the Chair of Council. There were also numerous other House meetings and events which the members of the team attended. The team also had numerous informal conversations over meals and tea with staff, students and spouses.
10. Documentation included the most recent Annual Self-Evaluation forms, other papers prepared for the review team to address the review criteria, documentation from the validation process with the Durham University Council and other committee meeting minutes and papers, financial statements, Handbooks, marked scripts as well other miscellaneous documents requested.
11. The review team would like to express their appreciation for the hospitality and cooperation they received from all members of the institution, staff and students. All requests for further documents and meetings were graciously received and responded to quickly. All students and staff were honest and candid, cordial and considered, in responding to our questions and to the review process.

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(es).

12. The institution has a clearly stated set of aims, objectives and policies consonant with preparing students for ordained ministry in the Church of England. This is articulated in the Trust Deed, documentation provided for the review and also found within other documentation which undergirds the life and ethos of the House. It is also embedded in the practice and discourse of the leadership and staff of the House.
13. Their aim is clearly stated as providing 'residential formation for the priesthood in the Catholic tradition in the Church of England'. It is important to understand that this distinctive ethos is rooted in the history of the institution in relation to the Tractarian movement and the Cowley Brothers. This provides an ethos that is distinctly Anglo-Catholic.
14. Within that tradition, the aim and objectives with relation to formation as stated in the validation documentation with Durham University state: 'To nurture Christian faith, life and discipleship in the context of a prayerful and worshipping community, in order to prepare candidates for an ordained ministry which is directed to mission and pastoral care; collegially understood and practised; liturgically defined and oriented; and rooted in virtuous habits of prayer, wisdom and true professionalism'.
15. Its aims, objectives and policies include providing academic formation appropriate to the capacity and previous education of each student using Oxford University qualifications as a Permanent Private Hall of the University of Oxford, and using the Church of England Common Awards as a Theological Education Institute validated for this purpose by Durham University.

A.ii They should be consistent with the current published policy statements of the sponsoring church(es).

16. The aims, objectives and policies with regard to preparing ordinands are consistent with the policy statements of the Church of England. The leadership

and staff regularly reflect on this in order to ensure they are adhering to these aims and objectives and the church's policy statements at staff meetings and at Council meetings.

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.

17. The House has responded to and engaged constructively with the previous inspection report as demonstrated in the follow-up report of July 2011. The institutional reviews and assessments in the University of Oxford are not prone to annual written reports but the House responds as prompted and required by the University to any changes or developments in order to improve or enhance its institutional mission. Its relationship to Durham University has only commenced this academic year so no reports are available.
18. The Annual Self-Evaluation forms provided by the Ministry Division of the Church of England have been in use for several years. The House, however, has only in the past year engaged in this process so there is little documentary evidence of the impact of this process. The self-evaluation documentation provided for this PER is acceptable and demonstrates a thoughtful engagement with the process. From staff meetings it is evident that this process is now integrated into the yearly academic schedule of the tutorial staff. In the autumn of 2014 an external Quality Nominee was appointed to assist with the self-evaluation process.

Recommendation 1: We recommend that the Self Evaluation process be reviewed to ensure that it is fully embedded into the life and practice of the institution at all levels in order to ensure the most effective use of this process for determining areas of improvement.

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| <p>The review team has Confidence with regard to Criterion A, Aims, Objectives and Achievements of the Institution.</p> |
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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.

19. The House remains in good partnership with other providers of theological education in the region. It participates actively in OPTET which includes four

core members, Regent's Park College, Ripon College Cuddesdon and the Oxford Ministry Course, St Stephen's House, and Wycliffe Hall. The other members are Blackfriars (Roman Catholic – Dominican), Campion Hall (Roman Catholic – Jesuit), St Benet's Hall (Roman Catholic – Benedictine), and Harris Manchester College (Free Christian). The Westminster Institute of Education (Oxford Brookes University) and the Church Mission Society are associate members. Until the recent introduction of Common Awards by Durham University the House was in partnership with Wycliffe College to provide a part-time mixed-mode type training programme. Two students commented on their very favourable experience in this programme.

20. OPTET serves in part to ensure the coordinated and effective teaching of modules for the Oxford University BTh. programme. With the introduction of Common Awards, the BTh. programme is being phased out. The future commitment is that in the final year of a Common Awards programme, there will be joint teaching of modules across the core institutions of OPTET as has been the case with the BTh. This is a potentially important development for the partnership.
21. The House tutors find OPTET helpful in providing opportunities to meet and discuss common matters especially with regard to tutors who teach common subjects. Students also stated that they benefited from regular opportunities on designated occasions of visiting other institutions by joining them for worship and meals. OPTET staff regularly meet and reflect on how the partnership can best be utilised for staff and students.
22. The House has a representative on the South Central Regional Training Partnership. They have not been active members recently. However, the RTP has not particularly focused on residential training.

B.ii The institution should draw fully on the resources of universities in teaching, quality assessment, staff development and the promotion of research.

23. The House is a Permanent Private Hall within the University of Oxford. This provides the tutors, staff and students with numerous privileges and resources from the University. The tutors use the research opportunities such as libraries and funding. They are invited and regularly participate in staff development or training opportunities provided by the University. Support staff likewise make good use of the University resources with regard to numerous matters like information technology and human resource issues. University lectures and library facilities are available to all students registered on Oxford awards and the college pays so that all others in the House have library access.

24. It was a distinct benefit that Oxford University permitted St Stephen's House to offer students awards from another university, the Durham University Common Awards. This permission is time limited and subject to the larger review the Faculty of Theology and Religion of Oxford University is conducting on its role in ordination training (see para 32).
25. The Principal sits on the University of Oxford PPH Heads of House Committee which ensures regular communication to the House about relationships and governance with regard to the university as well as quality assurance matters. From minutes of the Council and the staff meeting the relationship with OU is kept under review.
26. The staff are looking forward to the opportunities for staff development and research that links with other TEIs will bring through the Common Awards and as facilitated by Durham University. There remains some confusion as to the status of students on Common Awards with Durham University and the entitled benefits that brings.
- B.iii It should engage effectively with local churches, other faith communities and secular organisations so as to enhance formation for public ministry.*
27. As evidenced from the wide ranging placement opportunities provided by the House for ordinands, the House is effectively engaged with local churches and secular organisations. There are also sufficient opportunities in placements, modules and pastoral study units to engage with other faith communities. The Centre for Muslim-Christian Studies is housed in the Song School of St John the Evangelist Church which is part of St Stephen's House facilities. The Centre contributes lectures and input to the ordinands regularly.

The review team has Confidence with regard to Criterion B, Relationships with other institutions.

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.

28. At the beginning of the 2014-15 academic year, the House offers two main tracks of academic programmes, those awarded by the University of Oxford (BA, MTh, Post-graduate Diploma) and those validated by Durham University with regard to Common Awards (BA and Diploma). There are also students finishing programmes that will no longer be offered in the future (BTh, CTh, CTG CTPS and DTSP).

29. The theological, formational and educational rationale for the Oxford awards are well embedded in the institution as these awards have been offered in the House for a number of years. Aims and objectives of these academic programmes are detailed in the Faculty of Theology and Religion Handbook. Though the Oxford awards are rigorous academic tracks, students also take House courses alongside the Oxford papers for development of ministry and pastoral theory and skills to enable formation for ministry.

30. The House provided their rationale for their curriculum pathways in the documents submitted to Durham University for validation as a TEI. These demonstrate a clear rationale for their approach to mission and to formation for ministry and discipleship. There is also a succinct statement of their rationale on the website under ministerial formation for students and the public. We urge the House to add a similar general statement of the House's intent in this regard in the Handbook in section 8, Material Relating to Ordinand Students Only. Their documents sit alongside the comprehensive rationale that is part of the Durham University documentation for the Common Award Programmes.

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.

31. The House has begun using the Ministry Division Annual Self-Evaluation forms for all its academic programmes. The review team has seen the documentation

and discussed them with the staff. The staff are engaged with this review process in order to ensure that the learning needs of ordinands are met and that ordinands are prepared for future ministry. Meetings of OPTET also provide opportunities to reflect and review theological education and training among the member institutions.

32. The Faculty of Theology and Religion is presently reviewing its role in ordination training. This review potentially will be helpful in clarifying the relationship between members of OPTET and the faculty and the academic awards used for ministry training. However the review also means a level of uncertainty as to the possible outcomes and how these will affect the House and other ministry training institutions in Oxford.

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

33. Academic assessment methods are detailed for the University of Oxford awards in the Faculty Handbook. Similarly, assessment methods and criteria are detailed in the handbooks provided by Durham University for the Common Awards. These sit alongside the formation criteria for the Church of England. The House has mapped its academic and formational experience against the formation criteria demonstrating a good understanding of what contributes to integration and formation. We urge this document to be redone using a more graded evaluation of how different dimensions achieve outcomes and meet the criteria (i.e. primary, secondary, tertiary). There is evidence of ongoing reflection and evaluation of the academic and formational experience in the minutes of the Staff Meeting and from conversations with the tutorial staff.
34. Academic and formational assessment is facilitated by the yearly report process which includes directed student self-reflection, conversation with personal tutors and with the Principal. Students and staff both commented that this process was conducted well and provided helpful reports. Several Bishops also stated the reports they received from the House were helpful. Staff keep this process under review in their meetings and in discussions with students. In addition, as we observed, tutor groups provide a forum for assessment of progress through the theological reflection and conversation at these meetings.

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| <p>The review team has Confidence with regard to Criterion C, Curriculum for formation and education.</p> |
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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?

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. The House Handbook provides evidence of the House's expectations for student participation in the corporate life of the institution, as being integral to its understanding of the nature of training for ordained ministry.
36. The corporate life is distinctly expressed in Tutor Groups, which form the primary pastoral unit in the college, and are led by a Group Tutor, and a student Group Convener. Discussion with ordinands gave us good evidence that this system is one which is appreciated by many, and which allows good interaction between all students. Observation of these groups showed that they are used well, and enable good reflection on the corporate life of the college, as well as enabling students to have their own input through the projects they undertake within these groups.
37. A discussion with married students did note a slight concern that it sometimes takes a little longer for them to get into the social life of the House because of the living arrangements. However, our observation was that though married students live slightly separately from the single students, they are still on site, and that this enhances the sense of corporate life, and it is difficult to envisage how this could be improved. It was noted in conversations that provision is made for children both at worship and in the Common Room, which was very much appreciated. We would very much want to endorse the journey the House is on with regard to provision for families and encourage them to continue in their development of that provision.
38. Spouses expressed appreciation that there is no enforced participation in the corporate life for them, but that they felt welcome to opt in as much or as little as they would like. There was a minority view that the college could be more proactive in its initial welcome, with a simple suggestion of an email to those who are resident when new students move in.

39. Observation as well as conversation with students and staff gave good evidence that the corporate life was shown in the very strong sense of community which is experienced by all, and in the very real commitment to prayer which is clearly expected of all ordinands. This attendance at worship is not expected from those who are not training for the Church's ministry, but our observation was that one or two non-ordinand students did engage in the common prayer life, and that their presence was both welcomed and encouraged. The document on Liturgical Conventions makes it clear that members of the wider St Stephen's community, including children, are welcome to take part in sung celebrations of the mass. There was clear evidence to us that there was a strong connection between worship and study as a part of the formation offered by the House.

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.

40. The Review team has seen the policy statements on Harassment and on Freedom of Speech (OU documents); on Information Security and Data Protection, Safeguarding, Disability Equality Scheme, Bribery and Fraud, and Freedom of Information Publication Scheme. We have seen other policy statements included in the House Handbook and the Health and Safety Handbook. We are satisfied that these are consistent with current published policy statements of the sponsoring church.

41. The common life of the community clearly fosters an environment where issues of natural justice are able to be worked out in the training provided. They reflect an understanding on issues of gender and equality that enables all members of the college to live and work in an atmosphere which allows for disagreement and debate, but which expects and requires courtesy at all times. The evidence we have seen is that staff and students are content to speak quite openly about these issues in creative ways. We saw evidence from the presence of external students that ordinands at St Stephen's House are able to engage with people of different nationalities and faiths in very positive ways. Whilst we acknowledge that the House is strong in this area, we were not able to identify a written statement, particularly with regard to the gender policy.

Recommendation 2: We recommend that the House publish written statements of their understanding of gender and ethnic grouping.

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

42. The Vice Principal acts as the House Safeguarding Officer, supported by another member of staff; and the safeguarding policy is readily available on the college website. The policy is managed through a session in induction week, introducing it to all new members of the house, and through a three-day course including input from Oxford Diocese, a Survivors of Abuse organisation and the Local Authority Designated Officer. The House makes it clear to students with families that parental supervision is important throughout the day, despite the perceived safety of a gated community. With regard to the regular Sunday School, those leading are encouraged to re-read the policy and guidelines prior to delivery.

The review team has Confidence with regard to Criterion D, Community and corporate life.

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.

43. The House has a clear policy on the expectation of ordinands to attend daily acts of worship, and of those acts of worship which are optional. A document outlining the liturgical conventions is published by the college. It is clear that the compulsory worship offered by the college adheres quite strictly to authorised forms and to the liturgical convention document. From observation of worship and from conversations with students, both present and former, and with staff, we were satisfied that the worship offered reflects the liturgical inheritance of the wider church, and prepares students for ministry within the wider Church.

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.

44. The Liturgical Conventions document includes information on the use of the Book of Common Prayer, the provision of a student-led Children's Liturgy of the Word on Sundays, and on the provisions laid out for occasions when a female priest celebrates at the daily Eucharist. In addition to the regular use of Common Worship for Morning Prayer and the usual daily mass, the Book of Common Prayer is used daily for Evening Prayer, and there is a monthly celebration of the Prayer Book Communion Service.

45. We would commend the House on its approach to the issue of women in priestly ministry. The normative daily mass is celebrated once per week by a female member of staff, something which we understand has been the case since 1995. On those occasions, in accordance with the 'Bonds of Peace' document, an alternative mass is celebrated prior to evening prayer for those who cannot, for theological reasons, receive the sacramental ministry of women priests. We understand the Sunday morning mass is an occasion where the House sees it as important for the whole community to get together, and for this reason, this mass is not celebrated by a female priest. Though this is clearly a matter which is difficult, both for the inevitable theological division it causes within the community, and in particular because the female member of staff is someone who is well-respected and loved within the community, it is seen as the best possible solution to what is a difficult situation for the whole of the Church, and our experience has been that this is very much the case, and it is dealt with as sensitively and with as much understanding and hospitality as possible.
46. We do wonder, however, whether there might be some occasion where a female priest may have the opportunity to celebrate a sung mass. While we understand the reluctance to initiate this on a Sunday, because of the very real experience of this mass as being formational for the community, we would suggest that there may be other occasions where this might be appropriate, within the tradition of St Stephen's House.

Recommendation 3: We recommend that the House explore creative ways, in the light of the Five Guiding Principles and within the tradition of St Stephen's House, in which a female celebrant could celebrate the sung mass on occasion.

47. Conversation and written evidence showed that there is a minority who express dissatisfaction with the college's possibilities for more innovative forms of worship. While a number of students stated that they appreciated the fact that the worship offered was very much grounded in the catholic tradition, and that this grounding equips them for exercising their ministry in a variety of contexts because of its regularity, some expressed a desire to allow a little more flexibility in the worship. From our experience of worship, we acknowledge that the regular acts of worship are very much in a similar style, but we observed and discovered that there are opportunities, both within college and on placements, for students to be more experimental (see para 51).
48. The regularity of the style of worship was defended both by staff and a large number of students, for the way in which it grounds ordinands in a particular tradition, and the formational aspect of giving them a way of worshipping which,

though not likely to be emulated exactly in a parish setting, nevertheless demonstrates a high quality liturgical inheritance to which they can look when crafting future parish acts of worship. Former students were appreciative of this, and praised the college for its liturgical preparation which gave what they described as the 'golden thread of liturgy', and thus enabled them to serve in a variety of contexts across the Church of England.

49. There were a few negative comments made by former and present students regarding the regular use of Latin texts in the sung worship of the House. A conversation with staff, and evidence from the published music rota outside chapel convinced us that a balance is sought, and we were made aware that on occasions when Latin is sung in the liturgy, a modern-language translation is provided in the liturgy booklet.

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.

50. In addition to the Sunday mass, a student-led Children's Liturgy of the Word is offered. We would very much like to commend this practice, both in its value for fostering community life, and in its preparation of students for the leading of creative acts of worship with children and young people. Evidence from conversations showed that this is something which is appreciated particularly by those with children, but is also valued by the whole House community. Our only concern in this area was that, though we were impressed by the description of what appears to be good quality delivery, many students would appreciate specific training in this ministry, as it can appear to them to be delivered on an ad-hoc basis, with some students relying on others who have secular experience of teaching to lead some of the sessions.

Recommendation 4: We recommend that specific training is offered to students in the planning and delivery of appropriate sessions for children and young people.

51. During our time at the House, we witnessed an act of worship planned and led by one of the Student Groups. This gave us good evidence that students are allowed flexibility in their style of worship, and in the type of music used in Church, and that they are able to 'mine' the depth of the tradition for innovative ways of expressing that tradition. The group in question had an opportunity to reflect on it in their meeting the following morning, which demonstrated a maturity in assessing the positive and negative aspects, and, in particular, a genuine

sensitivity to those of other traditions, as the group reflected on the form of Compline that followed. We were also aware from conversations that other groups have had similar opportunities, both within the college and in the wider community, and that they are equally encouraged to reflect theologically and critically on their provision.

52. We would, therefore, urge the House to build on these very strong foundations, and to continue to encourage students to develop their liturgical flexibility through these group projects, as evidence shows it allows them a valuable opportunity to reflect on what might be good practice in a future parish in the relatively safe setting of the theological community.

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

53. The liturgical spaces within the college are ideally set out for the worship which is offered within the college, and are used well. The chapel for daily worship is quite traditional in a collegiate-style arrangement, with the Sacrament reserved for private devotion. This provides an exceptional setting for the antiphonal reciting and singing of psalmody in the offices, and also for the style of the daily mass offered in college. The church of St John provides a much more flexible space for the Sunday mass, celebrated at a nave altar, but which can be, and is on occasion, used creatively for more innovative acts of worship. The choir offers a more traditional setting, and the Sacrament is reserved in a side Chapel for private devotions. The founders' chapel on the top floor of the building, which is not easily accessible for those with disabilities, is still used occasionally.

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

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.

54. The House has a clear policy statement on its aims in this area, focusing on its provision of residential formation centred around three questions: 'Who is Jesus Christ?' 'What is the Church?' and 'What is a Priest?' We have seen evidence

both from observation and from conversation with staff and students that this is something which is very much at the heart of what the college provides. The academic formation is provided in conjunction with the University of Oxford and through Common Awards with Durham University, with spiritual formation founded on a life of regular prayer in the context of a close-knit community.

55. On the whole, we found good evidence from conversations with staff and students, and from our observation of worship and teaching that the institution does allow candidates to be immersed in a particular tradition of the Church of England. We were satisfied that this was not to the exclusion of all other, and the range of placement parishes shows that the college is seeking to enable its students to gain as wide an experience as is possible, including experience in Interfaith engagement in the local area, as evidenced through a conversation with placement supervisors. There were one or two concerns expressed by students regarding the quality of some of these placements, and the wisdom of selecting them, but on the whole we were content that they worked well to enable students to gain an empathetic understanding of these traditions and practices. We would, therefore, urge that care continues to be taken to ensure that students' individual needs are always taken into account when identifying placements, within the constraints of what is available to the college (see also para 67).

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.

56. The House actively encourages ordinands to make use of a spiritual director regularly. It provides corporate guidance for students through the use of a group system, which is appreciated, and through individual meetings with students. In addition, the college runs an annual retreat in Advent, and keeps Holy Week corporately in alternate years. Students speak warmly of these opportunities, and clearly appreciate the spiritual development they offer.

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.

57. Conversations with students, and contact with former students gives good evidence that the college enables them to grow in their discipleship and enables them to share their faith in the contexts in which they serve. We saw ample evidence from conversation with students, and from observing one of their Group

meetings, that students are given good opportunities to develop as reflective practitioners, both in the context of their preparation and leading of worship, and also in their theological reflection on their pastoral placements.

58. Observation of one of the Group meetings and conversations with both staff and students demonstrated that the subject of mission was high on the House's agenda. One group was working with a local church to create an act of mission on the street and at the train station for Ash Wednesday. Another group was engaged in community service through a local church. The recent community event of prayers for peace hosted by SSH was being used by one group as an opportunity to enter into dialogue with the Muslim community. We observed that students were able to reflect well on their engagement with mission both in the diverse local community surrounding the House and when undertaking their pastoral placements. We were convinced that the House prepares students well for the task of sharing their faith in an engaging and appropriate way.

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

59. Conversations with students show evidence that they identify the teaching staff in the college as people who 'clearly love Jesus', and who model a life of spirituality for the whole House. A staff member noted in conversation that St Stephen's House is 'a place where the love of God, love of the Church, and love of Wisdom come to expression in a common life of study and prayer in an extraordinary way.'

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

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

60. Documentation submitted prior to the Review expressed the overall philosophy with regard to aims and objectives of the House (see for example Durham University Self-Evaluation Document Part 1 A4 and also *C.i* above). The House

has produced a Handbook for Common Awards students including details of the work programme, directions to assessment guidelines and other relevant matters and which will be updated as the Common Awards programme develops. Students are also advised as to how to access information on line. Students taking the Oxford degrees are given Handbooks and are referred to the Academic Server for the aims and objectives of specific programmes. Conversations with students following a variety of pathways confirmed accessibility to this information. The documentation from Oxford and Durham Universities also provide module descriptions with clear sets of aims and learning outcomes.

61. The House Handbook (pp. 10-18) contains much information on important academic matters but there is no clear mapping of the formational programmes of the House to the Church of England's Expected Learning Outcomes at the point of Ordination. There is a version compiled for use by the staff which is not as helpful as it could be because it is undifferentiated as to what level certain courses and experiences actually meet the outcomes. It would be useful if a checklist that correlates the Church's criteria with the ministerial skills and competences covered within the House's formational programmes were formulated more precisely and made more widely available to students (see also para 33 above).
62. There was unanimous appreciation amongst students of the spirituality and discipline of the House which they saw as underpinning their study. The academic rigour of the Oxford BA degree and exposure to leading theologians was appreciated by students who considered the additional workload associated with ministerial training to be an expected challenge. We would encourage continued attention to enable the most able students to maximise academic potential. Students taking the Durham Common Awards expressed concern that some aspects of the administration such as essay titles and assessment modes were not ready and the attempts by House academic staff to overcome difficulties were appreciated. There was a perception that the academic content and workload of students taking the Common Awards programme was less demanding than that of students taking the Oxford Awards but students from both cohorts showed maturity towards this matter. Students taking the Common Awards suite were uncertain as to their status with Durham University and staff also were still learning the details of the arrangement. Students continuing on the BTh programme affirmed and appreciated the academic rigour of the teaching and the ministerial development offered in the programme.

63. Postgraduate students appreciated the high level of academic teaching but articulated their primary need for focus on ministerial training. The House endeavours to provide a complementary set of modules and experiences to ensure ministerial training and formation. The review team took seriously the concern raised by a few post-graduates about timetabling issues (three hour lectures, five hours back to back teaching), some formational courses being taught by anecdote or being taught from unrelated lecture series. Those taking the MTh degree expressed appreciation of the Course Directors' support and exposure to leading theologians. There was a perception amongst some MTh students that the courses they were taking with other students were at a lower level than that to which they were acquainted and that this sometimes, for the sake of embarrassment, resulted in them not fully participating in class discussion. The Self-Evaluation form for the MTh mentions the intent to set up a post-graduate seminar to enable greater opportunities for integration. The review team would encourage this to be implemented.

64. Overall, the majority of the student cohort in all programmes affirmed confidence and respect for teaching delivered by the House academic staff. From all the documentation, conversations and observation, the review team was satisfied that the teaching and learning for the various pathways is well structured with clear and appropriate aims preparing candidates for ministry.

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

65. The House is committed to the integration of theoretical learning with formational and skills courses (see for example The Programme Self Evaluation Report 2013-14 for the BA (Honours) in Theology and Religion degree) (see also *C.i* above). A focus for this integration occurs in the Tutor Groups where theological reflection is emphasised and practised to a high standard. Observation by the review team and conversations with students confirm this. In addition, integration occurs through reflection with the pastoral and academic tutor and through the yearly reporting exercise which forces reflection and integration, as well as through the daily worship. Morning Prayer often ends with a period of twenty minutes silence which provides a distinct opportunity to reflect. Academic staff seek to identify evidence of integration through the yearly reporting process, when hearing students preach, and through evaluating placement reflections.

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.

66. A variety of teaching methods are used. We observed very good and excellent examples of confident, well prepared teaching within the House mainly in small groups and in the context of small classes or tutorials which allowed for interactive teaching. Students were engaged and were affirmed. In all teaching there was an appropriate use of hand-outs and good humour.
67. Students saw placements as complementing academic study and ministerial training. Married students recorded appreciation of the House's attempts to arrange summer placements within travelling reach of Oxford. There was some disappointment amongst some postgraduate students that placements did not always provide experience in areas in which they had identified as being deficient. One feature of the ministerial education offered within the House is the range of pathways open to students which, in principle, reflects the range of backgrounds from which ordinands come. Careful consideration is given to the needs of individuals initially through scrutiny of BAP and DDO reports. In addition, each student completes a pastoral survey before a placement to help identify experience and issues the placement might address. It is evident that staff do everything possible to accommodate the wishes of students and to address training needs in the placements allocated. Many students confirmed this. The House does appear to have a wide network with a wide range of opportunities for providing experience through placements.

G.iv There should be an appropriate learning environment, with adequate resources including library and information and communications technology.

68. The learning environment is generally good (see comments in *G.iii*). There is a well-stocked library supervised by a part-time librarian who is available on site two days a week and at other times by email. Set texts for ordinands are generally provided (dependent on academic staff providing reading lists). The librarian preserves an antiquarian and historic collection for the House. There has been investment in both books and library furniture in recent years. Some students commented that there was a shortage of key textbooks in the House library, but this is mostly about the number of copies. However, the range of library facilities the House makes available to the students through the University of Oxford is immense and all within a short walk or bike ride. The library catalogue in the House is computerised but we were advised of shortcomings in the present IT system—it is very slow and cumbersome. We encourage the House to review the Library provision in terms of books available and the adequacy of the computer catalogue

Recommendation 5: We recommend that the House review the Library provision in terms of books available and the adequacy of the computer catalogue in order to maintain appropriate in-house resources.

69. Students and staff IT facilities are supported by a part-time consultant who is available on site two days a week or via email. He continues to upgrade equipment as resources allow. There is a well-equipped computer room for use by students who require it. Most students have their own computers. Good access to the internet is provided. Conversations with the consultant and some staff suggest that the basic IT infrastructure for support staff is not as up to date as it might be given demands and the House will need to consider investment in a more robust system in the future.

Recommendation 6: We recommend that the House review its IT infrastructure in order to identify a plan for upgrade as necessary.

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.

70. Assessment criteria and procedures are available in the Handbooks (see G.i) and students confirmed knowledge of these. Staff and students confirm that there are regular opportunities to provide formal and informal feedback as to progress in academic work and formation for ministry. We examined samples of marked student work. The quantity of feedback given on the scripts varied. The feedback was of good quality and was helpfully reflective.

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.

71. It was clear to us from our observation of classes, worship and the common life of the college that theory and practice are consistently integrated in the way in which ministerial formation is undertaken. Students described formation as being something that happens 'almost by osmosis', in that it underpins the whole of the student experience at St Stephen's House.

72. From the team's experience at the House, we would want to echo that, and our contacts with former students give evidence that it enables students to reflect theologically on their practice as they exercise their ministry. This is echoed in

the experience outlined in *F.iii*, where we saw ample evidence of students' ability to reflect theologically, both on their experience in leading worship and on their pastoral placements as well as in informal conversations at meals, etc. Even conversations with students at meal times often demonstrated discreet skills in theological reflection. It is clear that theological reflection is actively encouraged, and allows students to integrate theory and practice in the context of the changing society in which they will minister.

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.

73. There are four full-time academic members of staff. Two have been appointed within the past two years. Three are in Orders. The full-time appointments are permanent and without fixed term tenure. There is one part-time female member of staff who is in Orders with two years part-time experience in ordained parochial ministry. As a theological institution that trains women, the lack of a full-time female tutor means it does not fully meet Church of England policy in this regard.

Recommendation 7: We recommend the appointment of a full-time female member of the tutorial staff in Orders as soon as it is feasible.

74. Although small in number, these staff were identified by students as the main stay of community life. There are five Visiting Tutors (three are female) all of whom were consulted during the Review. All five complement the expertise of the full- and part-time staff. There are six Honorary Research Fellows (one of whom is also a Visiting Tutor) who were also consulted during the Review exercise. Three based in Oxford contribute advice and guidance in their areas of expertise. One of the Honorary Research Fellows is also a Lecturer in the Centre for Muslim and Christian Studies which rents space from the House and avails its

resources to the House and its students. These four Research Fellows give breadth to the intellectual base of the House. The House encourages its Visiting Tutors and Honorary Research Fellows to integrate into its life.

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.

75. Staff are recruited as and when a vacancy or need arises. All posts are advertised and selection is on the criterion of the person who best meets the job description. Examples of adverts were seen and found to be appropriate. Conversations with recently appointed staff confirmed openness in the procedure and thorough and fair selection processes.

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

76. Academic staff report to the Principal. Job descriptions of representative academic staff were seen. The requirements, responsibilities, and duties are clearly defined. There appeared to be no explicit indication of the reporting line to the Principal; neither were procedures for dealing with grievance defined. Job descriptions for administrative and support staff were also seen and found to be clear with implicit line-management ultimately resting with the Bursar. There are formal and informal procedures in place to deal with grievances from administrative and support staff.

77. In discussions with support staff it became evident that the college has no explicit organisational chart showing reporting lines between different posts. From our conversations with some staff, it is evident that some report to more than one person in different roles. An organisation chart would help to distinguish between line reporting (e.g., for appraisals) and other reporting relationships. We encourage an organisational structure chart for the House as a whole to be composed which includes relationships to Council and its Committees.

78. Job descriptions do not at present include the person to whom the post reports, which is unusual. From interviews with academic and support staff, it also appears that job descriptions generally are reviewed only when a new appointment is made.

Recommendation 8: We recommend that job descriptions be reviewed regularly as part of the appraisal process and that revised job descriptions clearly state to whom the employee reports for all aspects of their work.

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

79. Documentation concerning the annual appraisal of the full- and part-time academic staff by the Principal is in place. Although there is no formal appraisal of Visiting Tutors and Honorary Research Fellows the performance of Visiting Tutors is monitored informally by academic staff and through student evaluation questionnaires. There is provision for academic staff to raise matters concerning academic and personal development for discussion in their appraisal interviews. The Principal and appraisee are required to agree in writing any action to be taken as a result of the interview. Staff found these exercises positive and helpful.

80. All academic staff participate in termly Staff Training events and attend an annual two day residential event. Academic staff are also encouraged to engage with opportunities for professional development through University initiatives and staff do avail themselves as time allows. The research standing of the staff is good as claimed in the Handbook. None of the academic staff were included in the 2014 Research Excellence Framework exercise in which universities select staff perceived as having international excellence in research. The House may wish to consider mechanisms by which staff can be supported to pursue further research and scholarship which leads to such external markers of esteem.

81. Interviews with staff revealed that there is no formal induction process after appointment. This has meant familiarisation with the Oxford University system and the distinctive nature of the House life is prolonged.

Recommendation 9: We recommend that an induction process for new staff is created and implemented.

82. Non-academic staff are appraised orally by their line manager yearly. There is no documentation used or written record.

Recommendation 10: We recommend that appraisals for non-academic staff use a form in preparation for appraisals and that an agreed written record is kept of all appraisals.

83. It is encouraging that the Apprentice Maintenance Assistant receives external training and we were told that other support staff have attended appropriate

University courses. Whilst recognising that staff development does occur under informal arrangements we would encourage more formalised procedures integrated with the appraisal process.

J.iv Staff should be sufficient in number and expertise, and resourced to fulfil their role adequately for the institution's and students' needs.

84. Noting the qualifications and through observations and discussions, the review team concludes that Academic staff of full time-, part time- and visiting- status are well qualified and, as a cohort, are committed to meeting the academic and formational needs of the students. We note the burden of work on the current academic staff and urge that the House explore the possibility of increasing its academic cohort as resources allow in order to meet increased demands in the future. The administrative infrastructure gives appropriate support to academic staff.

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| <p>The review team has Confidence with Qualifications with regard to Criterion J, All staff.</p> |
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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.

85. Policies on welfare, complaints, discipline, and reporting to the sponsoring Diocese are well documented in the Handbook and reiterated during the student induction programme. Students appreciated the clarity given to these matters.
86. Admission procedures appear to be handled well. Students commented favourably on the openness and welcome extended at Pre Ordinand Dinners, Open Days and at interview. The pathways for individual students are formulated by academic staff after detailed consideration of the students' background and needs.
87. For a theological college that trains women for ordination the student cohort is below the recommended 15% female students. A greater number of female ordinands would give greater balance to the House community. The review team recognises attempts by the House to recruit female ordinands through pastoral

assistant schemes, special recruitment events and other measures. The three women ordinands were very positive about their experience and preparation for ministry at SSH.

Recommendation 11: We recommend that the House develop a plan for enhancing its recruitment of women ordinands.

88. Matters concerning assessment have been addressed in Section 4 G.v.
89. The arrangements for first appointments are handled by the Principal with input from academic staff following initial consultation with each student. The Principal directs students to curacies brought to his attention in the normal process. The discussions between the Principal and each student are an important component in the process.

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

90. Students have their own structures for organising student life in the House through the Common Room with elected officers. The President of the Common Room meets regularly with the Principal and finds these meetings useful. This structure enables the officers in their representative roles within the life of the House to solicit student views on all manner of issues. In addition, students are full members of the three main committees for the House: Academic Committee, Domestic Committee and the Group Conveners' Meeting. Students are generally content with the way in which their participation is received and that is confirmed by observation of these committee meetings. In addition, there are two student representatives (one has voting privileges) on the House Council at which the President of the Common Room gives a report at each meeting.

The review team has Confidence with regard to Criterion K, Students.

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.

91. The House has clear staffing and committee structures covering the areas of finance, administration and management. There are clear allocations of roles and tasks to specific individuals.
92. The financial team has adopted good practice in splitting responsibilities of invoicing and purchasing, with both overseen by the Bursar. Other financial roles (such as month end accounting, bank reconciliations, etc.) are also clearly allocated.
93. There is a specific post for accommodation and conferencing, recognising the importance of both student accommodation and other accommodation both for the student experience and for additional income-generation for the House. This latter includes longer term rentals to independent and PGCE students, and shorter term rentals for Bed and Breakfast guests and Conferences. This allows a clear focus on this area of the House's activities and we were told anecdotally that accommodation issues were quickly sorted by the accommodation and conferencing manager.
94. These, and other specific roles, such as academic secretary, allow for a degree of specialism which enhances efficiency and effectiveness. Cover for these roles is, in the main part, identified amongst other administrative staff to support the House during planned or unplanned absences.
95. The structures supporting finance, administration and management in the House are clearly understood and appear to operate well (see also section *L.iv* below). There are three other Trustee Committees which are: Finance and General Purposes (F&GP), Investment, and Fundraising.

96. The House's original Governing Document is dated 1877, and much of this is still relevant to the House's mission, purpose and governing structure. However, updates have been approved several times since then, the most recent being in March 2002. The Governing Body is fully compliant with all the requirements of the Governing Document.

97. We had some concerns that five of the currently appointed seven co-opted members of Council all have terms which finish in 2016, with the remaining two finishing in 2017. Losing this amount of experience at one time can be challenging for a Governing body. However, in our view there are several mitigating factors: firstly, co-opted members only account for 45% of the whole Governing body (see *L.iii* for more details on this) so the Council has stability in other areas and four of the seven are eligible for re-election in 2016. As the Governing document does not appear to allow for appointment for a term of less than 5 years, and therefore new members cannot be appointed for a shorter term to stagger the terms of office, addressing this issue appears to be out of the Council's immediate control. However, it is a potential risk, of which the Council needs to be aware.

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.

98. We attended one meeting of House Council and reviewed minutes of two years of meetings. It was clear Council took its responsibilities seriously, particularly in the key areas of theological formation, financial sustainability and oversight of the operational management of the House. These form the bulk of discussions at all Council meetings. In addition, there is a Finance and General Purposes Committee which reviews financial and operational matters in more detail and makes recommendations to Council, as does the Investment Committee on investment matters. The Fundraising Committee has been re-invigorated recently with the aim of building up an endowment fund to provide greater financial stability to the House. There are no delegated powers at present, although delegation is allowed under the terms of the governing document and was discussed by Council in November 2013. We believe the current system of no delegation works well, and allows all Council members the opportunity to contribute to financial and operational debate and take part in decision-making.

99. We saw strong commitment amongst Council members to the House and its aims, and a clear desire to carry out legal and other responsibilities to the best of their ability. This is partly evidenced by attendance which, at an average of over

70% over the last two years, is good. There was good questioning and self-review around issues of financial sustainability, not only through approval of the Accounts for the previous year and budget for the coming year, but also the establishment of a new Fundraising Committee and clear interest in other income-earning activities of the House. Concern for the reputation and effectiveness of the House was particularly evidenced by the ongoing review by Council members of former ordinands (the Working Party on Theological Education), to see if the House experience could be enhanced to prepare students better for parish ministry.

100. We commend the offer of ministerial placements by one or two Trustees who are in parish ministry to current students enabling these Trustees to bring first-hand experience of student life, expectations and progress to Council discussions.

101. Council reviews new posts and vacancies and confirms appointments.

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.

102. The House Council has five 'life Trustees' (with no end to their terms of office) which represents 25% of the voting members. This has the effect of giving a basis of stability to the Council. 45% of voting members are co-opted for their skills, experience and networks. Of the remaining six, two are appointed by General Synod and one by the Society of St John the Evangelist. The Principal is a member ex officio, and an academic staff member and a student are elected by their peers. So there is a good representation on Council from across the House's life, including the wider church from which the students come and to which they return.

103. The current House Council has strong financial and legal skills and is well represented with senior clergy in a range of posts.

104. The Council would be enhanced by the addition of commercial development and heritage building experience, to support the House's ambitions and challenges in these areas, especially as one Trustee with heritage building experience has recently resigned. There are currently two vacancies for co-opted members and we were told that the House, as part of its own internal self-evaluation processes, was seeking people with these skills to fill them.

105. The process for seeking new Trustees is entirely internal, which has always worked well in the past. We consider there may be benefit in advertising externally, seeking applications and going through a formal recruitment and appointment process. We understand the specialist nature of the House, its work and mission, but this process works well for other 'specialist' charitable organisations in potentially accessing a wider range of relevant skills and experience.

106. We had no concerns about Council members' understanding of the respective roles of Trustees and staff. Discussions at Council meetings are at an appropriate level for the business at hand and cover a good range and balance of appropriate strategic and operational topics. Job descriptions of senior staff (and new staff) are considered and approved by Council. New Trustees are given induction in the form of key legal and financial documents and an invitation to discuss any aspect with the Chair and/or Principal. Opportunities are provided for Trustees to experience and understand life in the House by invitation to various House events and by their participation in House life on days of trustee meetings. There is an annual residential meeting of Council in September which allows for greater self-evaluation and more detailed discussion of particular issues, including strategic direction. It is also an opportunity to get to know other Council members better. This appears to work well and is much appreciated by Council members.

Recommendation 12: We recommend Council members consider advertising co-opted posts externally and going through a more formalised recruitment and selection process to access a wider range of potential skills and experience.

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.

107. There is a good structure of involvement by all community members in decision-making throughout the House, including structured committees and informal gatherings. The structured meetings include: Domestic Committee (to review issues of maintenance, accommodation, catering etc); Group Convenors' meeting (to discuss issues arising out of the Ordinand Formation Groups), weekly House meetings (notices) and fortnightly Administration and Staff meetings, in addition to Trustee meetings: House Council, F&GP, Investment and Fundraising Committees.

108. Students are represented at House Council, Domestic Committee and Group Convenors' Meeting and are all invited to attend the weekly House Meeting. They

also have their own committee structures, particularly a Common Room Committee (which has sub-Committees overseeing social events, etc.). Students have clear mechanisms by which they can feed into decision-making processes at all levels (see also *K.ii*).

109. Academic staff are represented on Council (two voting members plus one other); on F&GP and on Fundraising Committee (chaired by the Principal). They also have informal Staff meetings twice a week and a more formal (minuted) staff meeting fortnightly, so have clear mechanisms for making decisions and feeding in to the main House decision-making body, House Council.
110. Administrative and other staff are represented at fortnightly Administration meetings (chaired by the Principal), as well as at Domestic Committee (chaired by the Bursar). They also attend the weekly House meeting to give and receive notices.
111. Independent and PGCE students are invited to the weekly House meeting (although many are out at lectures or on placement by 9am), and can also be members of the Common Room, with representation to and through the student body in this way.
112. The one section of the House community which appears not to be represented well in the life of the House is that of spouses and families of students. There is no formal mechanism for them to make their views known on any matter affecting the House except through their spouses. No concern was expressed about this by any student or spouse, but the House may like to consider whether this needs addressing in any way in future.
113. In summary, communication between and among all staff and students is particularly strong in the House, with effective formal and informal mechanisms for making a contribution to decision-making within the House.

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

114. The audited Annual Reports are filed with the Charity Commission on time and have been for at least the last five years.

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

115. The House has a long-term strategy document which it calls a business plan. We could not see evidence that this had been approved by Trustees, although the contents are clearly in line with Council discussions and decisions. It sets out the core purpose and institutional and academic objectives of the House and then covers all the key areas of House activity (staffing, property, non-academic business activity, fundraising, governance and finance). For each area it sets out its long-term objectives.

116. The document is not dated, and best practice would suggest that it should include the date it was drawn up, the date it was approved by Council and the next review date (for example in one or two years' time).

117. This is a good, wide-ranging, clear and specific document. It could be enhanced by stating timescales over which the House sought to achieve these objectives (although some are ongoing), and more particularly, how it plans to achieve these objectives in the coming year, and in the next 2-5 years (an operational plan). It was clear to us that the House is operating to the Plan, and that initiatives are being developed to help deliver these objectives – for example, the House is currently recruiting a part-time Development Officer to help deliver the fundraising objectives set out in the document. This appointment was discussed at F&GP, then approved by Council and the recruitment process begun. However, it does not appear that links are being made between actions such as these and the overarching business or strategic plan, which would, in our view, help the House to prioritise actions and to review progress against its longer term objectives. An operational plan would help to make these links.

118. It is also not clear how the objectives would be measured. The operational plan would ideally contain performance indicators against which Council could monitor progress during the year, and take appropriate action if a particular objective was significantly under- or over- performing.

Recommendation 13: We recommend the House develops an Operational Plan, for Council to approve, covering the next two financial years in detail and the following three years in outline, setting out how it intends to achieve its strategic objectives, the budget it is proposing to allocate to this, and the ways in which it will monitor and measure performance.

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

119. Annual budgets are prepared and submitted to F&GP for more detailed review and then to full Council for approval. However, we are concerned about the timing of this approval. The budget is usually approved in September, but sometimes in November (as was the case during our review), which is nearly half way through the financial year. We understand final student numbers are not known until August/September and this is the cause of the delay, but we believe the budget should be prepared and approved before the end of June (financial year end) and changes arising out of finalising student numbers reported as variances. We were concerned that the budget presented to F&GP and Council for approval in November 2014 appeared to be a deficit budget (albeit a small deficit), and was approved as such. If a deficit budget is approved, there should be a clear plan for how the deficit will be covered (e.g., from reserves) and what monitoring procedures will be in place to ensure the situation remains manageable. On investigation, the budget was balanced, but had been presented in a confusing way, which made it appear as though there was a shortfall. However, it was clear from the discussion that Council was not aware of the confusion and believed it was approving a minor deficit budget.

Recommendation 14: We recommend the House changes the budgeting methodology, such that the budget is approved before the start of the financial year and any changes due to, for example, changes in student numbers, are reported as variances with appropriate narrative explaining the variances.

Recommendation 15: We recommend that the presentation of the budget is clarified and that any deficit budgets are clearly covered by sufficient reserves and supported by a longer term plan to bring the organisation back into surplus.

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.

120. The House has a full and comprehensive risk register which is shared with Oxford University. It broadly mirrors the categories set out in the business plan (strategy document) referred to above, although not exactly. It demonstrates good practice in identifying the impact of the risk, both in narrative and numeric terms and identifying mitigating actions.
121. It is not clear who is to take the action identified in the risk register, nor by when, nor the extent to which the risk will be mitigated by the proposed action. There is no comments section - for explanations of action taken or delayed for example.
122. We also consider the risk register (analysis) would benefit from the addition of a date of compilation, a date of approval by F&GP and/or Council and a date for the next major review.

Recommendation 16: We commend the House for its comprehensive risk register and recommend taking it to the next level by the inclusion of timescales and individual responsibilities for implementing the identified mitigating actions, and also including approval and review dates of the register as a whole.

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| <p>The review team has Confidence with Qualifications with regard to Criterion M, Business planning and risk management.</p> |
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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.

123. The House's Financial Procedures Manual is comprehensive and easy to read. It sets out clear procedures for all financial transactions and ensures good 'checks and balances' for the avoidance of fraud. It is not dated nor is there a date for a future review, both of which would aid the currency of the document.
124. The House has an Investment Committee to control and manage its investment portfolio, which comprises two Trustees (both of whom have strong relevant skills in this area) and the Bursar. The Investment Committee reports to F&GP in its role of financial oversight. The Trustees' report in the Financial Statements for

the year ended 30 June 2014 states: *‘Investments have performed well both in capital increase and dividends’*.

125. No reserves policy is specifically stated in the Annual Report and Accounts. In the business plan, there is a stated financial policy: *‘to ensure cash reserves are in place to cover three months of running costs at all times’*. This is fully appropriate for the House, in our view, but should be included in the Annual Report and Accounts in future.

Recommendation 17: We recommend including the House’s statement of reserves policy in the Annual Report and Accounts in the future.

N.ii Management accounts showing performance against budget should be produced at least quarterly and reviewed regularly by the trustees.

126. From documents provided, minutes of meetings, and observation of meetings, the review team can confirm that management accounts, which compare actual expenditure against the approved budget, are considered by F&GP Committee, which meets at least quarterly (five times in 2013-14). A revised forecast outturn for the financial year is also reported which represents good practice as the implications of actual figures on the year-end position can be seen at a glance. Issues arising out of F&GP’s considerations are reported to House Council for discussion and decision.

127. Although variances against budget are shown on these management accounts, there is no narrative to explain what they are, how they have arisen or what action is proposed for the rest of the financial year. The House has a range of different income streams (see *N.iii*) and, with the exception of SJE Arts, these are not differentiated within the budget or management accounts. This means it is not clear which are making a contribution to House overhead costs nor how much. Donations are not currently clearly differentiated between purposes or sources, which could be of interest as the House builds up its endowment fund.

128. We therefore commend the House on its regular and full presentation of management accounts, including comparisons with budget and year-end outturn figures. However we did not see identification of the contribution of different business areas to the overall income position of the College which meant that decision-making by F&GP and House Council was potentially limited.

Recommendation 18: We recommend the House clearly identifies the income and expenditure for different income streams (business areas) in its budget and its management accounts, and includes a narrative explanation of budget variances in its quarterly reports to Trustees.

N.iii The institution should consider its sources of income and have strategies to identify and raise the funds it needs.

129. The House spends a great deal of time thinking and self-reflecting about its income streams as can be seen from the last two Council residential events, from Council and F&GP minutes and from talking to senior academic and non-academic staff. It has been innovative in its strategies to raise funds to support its core work of training ordinands for ministry so far (see paragraphs below) and has further fund-raising projects 'in the pipeline' to implement when funds allow.

130. The establishment of SJE Arts, organising a varied programme of musical events, has been a considerable success in its four years of existence. From a standing start in 2011, SJE Arts' budgeted income for 2014-15 is over £120,000 with a net contribution of around 30%. The surplus has so far been used on repair and maintenance of the church of St John, which is where the events and recordings take place. The initiative has also brought many other benefits to the House, including raising its national profile and contributing to the sense of pride amongst the local community. It has also had the effect of bringing more people into the church and into contact with the House.

131. The House works hard to generate income from its surplus rooms, again with dual benefits. Spare rooms are let on a longer-term basis to independent and PGCE students in Oxford which enriches the House community life. Short-term vacancies are advertised on the website 'Oxford Rooms' as bed and breakfast accommodation and this is very popular and brings in regular income.

132. The House encourages conferences and study days and is actively trying to increase its presence in this market, although this is slightly hampered by having some accommodation which is not en-suite and by limited disabled (wheelchair) access. This is an area where the House has plans to upgrade its estate to attract more conferences at better rates to increase its income (see section P).

133. The Accommodation and Conference Manager, responsible for these income streams or business areas, regularly liaises with her counterparts in other colleges so they can share best practice, and work together if they need, or have surplus, accommodation.

134. Another key recent initiative has been the re-invigoration of the House's fundraising committee, which has been active at key points in the House's history to raise funds for particular projects. At its 2014 residential Trustee weekend, Council agreed to re-establish the Committee and create and fund a part-time

Development Officer with a view to setting up an Endowment Fund for the House, which would help support its long-term financial viability.

135. The House is constantly reflecting on its long-term financial sustainability in an uncertain world. It has plans to increase the potential of its property portfolio to generate commercial income in such a way that it does not interfere with House life. However, this requires investment which at present the House does not have.

136. We consider the House's diversified and forward-thinking income-generating strategy to be one of its key strengths.

N.iv The institution should have adequate financial controls aimed at minimising waste and loss, and should be appropriately advised on tax-efficiency.

137. The House has good financial controls, as evidenced in its Financial Manual, its staffing structure, the skills of its Trustees and the opinion of its auditors.

138. The House benefits to some extent from being part of the University of Oxford in some of its buying policies. It tenders key contracts to ensure value for money.

139. The House is advised on tax-efficiency by its auditors, and is currently actively reviewing the most tax-efficient way of running its trading operations. The Bursar has consulted colleagues in other colleges, one of whom has offered to share their experiences of reviewing the same issue.

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| <p>The review team has Confidence with Qualifications regard to Criterion N, Financial policies.</p> |
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O Statutory and operating policies

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

140. The accounting processes and procedures are sound, with proper books of account being kept. The Financial Procedures manual is comprehensive with clear instructions and appropriate levels of approvals set out within it. We suggest the date on which the Manual was last reviewed, and the date for the proposed next review, is included in the document to enhance its currency.

141. All data are backed up onto the server and all server data are backed up offsite by the University's central 'IBM Tivoli' system every night; this applies to the main data server, the firewall, the library and remote access servers. Backups are tested at least fortnightly to ensure their integrity and completeness.

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

142. Bank mandates are up to date and the review team consider them to have appropriate authority levels, both in terms of the seniority of those authorised to spend money and the threshold levels.

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.

143. The range of facilities and accommodation are fit for purpose and of a good standard and well maintained. The public areas are very well appointed and help to make the building warm and inviting. There is a well-appointed Common Room. The college style Dining Room seats eighty.

144. The two main teaching rooms, the Hope and Couratin rooms, are adequate with appropriate technology for a modern classroom (PC with internet, digital projector, interactive whiteboard, DVD and video, and wi-fi). A white board on the side wall of the Couratin room does not work particularly well. There is also a small seminar room, the Kemp room, which is adequately equipped for purpose.

145. Single student accommodation (forty-seven study bedrooms) is of a good standard. As we observed, rooms are well appointed and well maintained with fifty percent en-suite. Students are very positive about the rooms provided and the way staff address any issues.

146. From the review team's observation, married accommodation needs improving. The flats are now showing their age, built in the early 1970's. In the one bedroom flats the bedroom is only big enough for a double bed. The windows are metal framed and not double glazed so condensation and mould can be a problem in some flats. Married students commented that the rental charge seems high and some dioceses do not meet the full cost. Married students who move in early wish more was done to provide a welcome. Students commented that maintenance staff do an excellent job responding to any requests for repairs. The Council are considering several plans to refurbish the married accommodation, but much depends on the decisions regarding funding of married students.

Recommendation 19: We recommend that Council agree a plan to refurbish and upgrade married accommodation.

147. It should be noted that in recent years the church that is part of the House facilities, St John the Evangelist, has been very effectively refurbished particularly for the SJE Arts programme. However it is also used for the community mass on Sunday mornings and for other events as required. Recently grants and fund raising allowed the cloister windows to be glazed providing another area to be used creatively; on this review visit, an art exhibition was in place. The House is doing a very good job of securing funding to enable all areas of the property to be of a good standard and usable as required.

148. There is a document which provides a schedule for maintenance and refurbishment of the property.

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

149. As the Handbook and other documents state, the House provides very good support for students with learning disabilities drawing upon the support for this in the University of Oxford. A staff member specifically carries this remit. Students commented positively on the support available and received.

150. There are specific provisions for disabilities in the House. A hearing loop is available in the Couratin Room. One room is equipped to support any student with hearing impairment, such as a flashing fire alarm. There is a flat which caters to any student with mobility challenges.

151. There has been a slow effort to address mobility issues in the House particularly the ground floor. However it is not possible at this time to enter the House and access all of the ground floor if one has mobility challenges. The House is developing a Disability Equality Scheme.

Recommendation 20: We recommend the House complete the disability equality scheme with specific plans for providing mobility access for the ground floor.

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

CONCLUSION

Overall outcome: The review team has Confidence in St Stephen's House for preparing candidates for ordained and licensed ministry.

LIST OF RECOMMENDATIONS

Recommendation 1: We recommend that the Self Evaluation process be reviewed to ensure that it is fully embedded into the life and practice of the institution at all levels in order to ensure the most effective use of this process for determining areas of improvement.

Recommendation 2: We recommend that the House publish written statements of their understanding of gender and ethnic grouping.

Recommendation 3: We recommend that the House explore creative ways, in the light of the Five Guiding Principles and within the tradition of St Stephen's House, in which a female celebrant could celebrate the sung mass on occasion.

Recommendation 4: We recommend that specific training is offered to students in the planning and delivery of appropriate sessions for children and young people.

Recommendation 5: We recommend that the House review the Library provision in terms of books available and the adequacy of the computer catalogue in order to maintain appropriate in-house resources.

Recommendation 6: We recommend that the House review its IT infrastructure in order to identify a plan for upgrade as necessary.

Recommendation 7: We recommend the appointment of a full-time female member of the tutorial staff in Orders as soon as it is feasible.

Recommendation 8: We recommend that job descriptions be reviewed regularly as part of the appraisal process and that revised job descriptions clearly state to whom the employee reports for all aspects of their work.

Recommendation 9: We recommend that an induction process for new staff is created and implemented.

Recommendation 10: We recommend that appraisals for non-academic staff use a form in preparation for appraisals and that an agreed written record is kept of all appraisals.

Recommendation 11: We recommend that the House develop a plan for enhancing its recruitment of women ordinands.

Recommendation 12: We recommend Council members consider advertising co-opted posts externally and going through a more formalised recruitment and selection process to access a wider range of potential skills and experience.

Recommendation 13: We recommend the House develops an Operational Plan, for Council to approve, covering the next two financial years in detail and the following three years in outline, setting out how it intends to achieve its strategic objectives, the budget it is proposing to allocate to this, and the ways in which it will monitor and measure performance.

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