Quality Assurance and Enhancement in Ministerial Formation

A guide for reviewers and training institutions

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1 Introduction

1.1 This handbook explains the church's two main procedures for the quality assurance (QA) of its initial ministerial training. These are Annual Self Evaluation (ASE) and 6-yearly Periodic External Review (PER). It also sets out the procedure for approving new proposals for ministerial training (Section 8).

1.2 Almost all of this handbook relates to QA for the initial period of training ('IME1') before ordination or licensing. The exception is ASE, a version of which applies from 2018-19 to curacy training ('IME2' for ordained ministry), as described as Section 3.

1.3 The handbook is intended for:

- **Training institutions**: the handbook sets out what is asked of Theological Education Institutions (TEIs) in preparing ASE returns and participating in PER, and how the quality assurance processes work.

- **Reviewers**: it explains what reviewers are asked to do, the working relationships involved in PER, and how Ministry Division will support reviewers in their task.

1.4 We hope that it will also be of use to a wider range of readers with an interest in the church's training for its ordained and lay ministries, and as background to the church's quality assurance reports on TEIs.

1.5 Links to further information are provided where applicable. The Ministry Division will be happy to respond to readers' queries or suggestions for clarification at any time. The division's staff team can be contacted via the details below.

2 Background to quality assurance in theological education and formation

2.1 The church's quality assurance (QA) framework covers training for ordained and nationally recognised lay ministries authorised by canon. It applies to all its training institutions (Theological Education Institutions, or TEIs): colleges and regional and local courses.

2.2 QA has two main elements: Annual Self Evaluation (ASE) and 6-yearly Periodic External Review (PER) of each of the church's TEIs.

Recognition of theological training institutions

2.3 Since the first half of the twentieth century the Church of England has operated a system whereby its theological colleges are formally recognised by the House of Bishops. Only a recognised institution may train ministerial students, offer approved training pathways, and receive national church funding to do so. A condition of recognition is Periodic External Review (PER) of the institution to ensure good standards in ministerial training.

2.4 The PER process described in Sections 4-7 operates alongside TEIs' Annual Self Evaluation (Section 3) as an external quality assurance check on institutions' aims and priorities in the light of national standards and expectations.

2.5 As paragraph 2.8 notes, the Baptist and Methodist churches are partners with the Church of England in its approach to QA. The three sponsoring church denominations' expectations of their ministers are set out at Appendices B-D of this handbook; and those are the standards that underpin QA for TEIs of each denomination. The Church of England's current formation criteria were approved by the House of Bishops in December 2014.

The development of quality assurance

2.6 **QA has expanded in scope** as training has evolved. From the early 1960s, regionally based non-residential courses began to be created to meet the need for new patterns of training and ministry, including locally-based ordained and lay ministries (OLM, Reader); and the scope of recognition expanded to include them. Accordingly, these courses became subject to periodic review and are required to complete ASE returns.

2.7 From 2014-15 the Ministry Division has applied QA to diocesan schemes training exclusively for LLM/Reader ministry, so that they too are now subject to ASE and PER. Although national church funding is not at present available for diocesan lay ministry training courses, self-reflection and independent external review against national standards have value in their own right when applied to training for nationally recognised ministries. It is hoped that recent and current reviews of diocesan courses demonstrate this and have been critically affirming and constructive.

2.8 **Ecumenical partnership**: By the end of the twentieth century, the Baptist, Methodist and United Reformed churches had become partners with the Church of England in the QA and recognition framework, adjusted for their church contexts and formational requirements. In 2012 the URC opted instead to develop its own more context-specific quality assurance; while the Baptist church now works with the shared QA framework only the case of one TEI. We also work with the Church in Wales and the Scottish Episcopal Church on the review of their training institutions.

2.9 **Annual self-evaluation** (ASE) was introduced as a requirement for training institutions from 2011-12. It aims to provide a framework that will help institutions to set and review goals on a yearly basis with a view to continuing development and quality improvement. The ASE reflection and action points are also important evidence for external reviewers as part of PER. From 2018-19, directors of curacy training (IME2) are also asked to undertake a form of ASE, but PER does not apply to this stage of training.

2.10 **Curriculum approval**: The church used to run a curriculum approval process separately from PER, whereby institutions were asked to respond to a detailed questionnaire, for review by a panel. In 2010 curriculum approval was merged into PER and remains a stand-alone process only in cases where the training institution wishes to establish a new training pathway and requires approval ahead of full PER in order to recruit students to it (Section 8).

Common Awards

2.11 Partly in response to financial changes in the HE sector and partly to increase commonality in national ministerial training, the church worked with Durham University to develop a set of validated Common Awards for its ministerial education. From 2013-14 these have been taught by most TEIs (with negotiated exceptions), and others have joined Common Awards since or are looking to do so. Now that Durham University is the academic partner for most TEIs (whereas TEIs previously worked with a diverse range of validating universities) there has been an opportunity to bring together academic and formational quality assurance, and this is reflected in the current format for ASE and PER.

2.12 **External quality assurance**: TEIs offering other awards are subject additionally to their partner university's quality assurance; but that process, so far as it relates to taught programmes, should normally go some way towards meeting the Ministry Division's requirements under this heading, both in terms of ASE and PER.

2.13 In addition, TEIs recruiting staff or students from outside the EU currently remain subject to external review by the HE sector's Quality Assurance Agency. Governance of quality assurance work

Governance of quality assurance work

2.14 Quality assurance work is managed by the Church of England's Ministry Division under the guidance of the Quality and Formation Panel. In addition to ongoing QA, the panel has a role in the oversight of the church's Common Awards partnership with Durham University, and in approving new training pathways.

2.15 The panel members are

- Rt Revd Jonathan Clark (chair)
- Ms Alyson Bird (Durham Common Awards administrative lead)
- Revd Dr Jonathan Dean (Methodist Church representative)
- Revd Dr Beren Hartless
- Prof Mike Higton (Durham Common Awards academic lead)

- Revd Dr Ivan Khovacs
- Mrs Christine McMullen
- Prof Clive Marsh
- Revd Dr Sally Myers (TEI representative)
- Ven Dr Peter Robinson

2.16 Ian McIntosh as Head of Formation leads the Ministry Division staff team on quality assurance, alongside Keith Beech-Gruneberg and David Hanson.

3 Annual self-evaluation (ASE) for IME1

3.1 Annual Self Evaluation (ASE) by TEIs became a formal requirement as part of quality assurance for Initial Ministerial Education (IME1) in 2011-12. Its underlying rationale, shared with higher education and professional sectors, is that QA starts with the institution's own judgements about its strengths, challenges, resource needs and priorities for action. Successive annual self-evaluations will build up a picture of the institution's ongoing goal-setting and achievement.

3.2 TEIs are encouraged to be as open and honest about their strengths, needs and challenges as they can, and to treat ASE as a document and process that will inform and help its own internal and external stakeholders.

3.3 Periodic External Review (PER) builds on ASE for IME1 by providing an external view on behalf of the House of Bishops (and relevant ecumenical bodies), based on investigation carried out by an independent review team with an appropriate range of skills and experience.

ASE format and readership

3.4 For TEIs offering Durham-validated Common Awards, quality assurance combines academic and formational evaluation. Therefore, ASE returns are reviewed by the administrative offices of both Ministry Division (and equivalent bodies in the partner churches where appropriate) and Durham University (Section B only).

3.5 TEIs offering programmes validated by other universities will need to follow the church's QA process and, additionally, to comply with their own university's academic review procedures. Durham colleagues will not be asked to review Section B material relating to the delivery or quality assurance of taught programmes by other universities, or of non-validated programmes.

3.6 TEIs are asked to report on a) Formation and Governance and b) Taught Programmes, and to provide a summary of current actions noted in those sections and an update on progress with the previous year's intended actions.

3.7 The self-evaluation model can apply at either single-institution or partnership level. If the operational level is the Regional Training Partnership (RTP), then the RTP will be the unit for annual reporting; if a theological college/course, then the institution.

3.8 ASE returns for the academic year should be sent to the Ministry Division by **30 November** following, and the Ministry Division will pass Section B to Durham University's Common Awards office as appropriate. TEIs are also asked to provide their current module overview table (form T4) along with the Section B form for Durham. The Quality in Formation Panel reviews a summary of all ASE returns.

Definitions

3.9 For the purposes of ASE:

- **formational pathway** = training course shared by a cohort of students and leading to a specified ministry. Ordinands and lay trainees, and full-time as against part-time students, will be on different pathways.

- **programme** = study leading to a specific academic award. Students working to a given academic programme may be following different formational pathways.

- **Theological Education Institution (TEI)** = a delivery centre validated by Durham University under Common Awards; or by extension a centre which offers awards of other universities. A TEI may be a regional partnership or federation including a number of courses or colleges that are considered as training institutions in their own right in other contexts.

- **formational centre** = institution which is responsible for the formational pathways offered to students.

Completing the ASE return

Key people

3.10 The key people involved for the institution are:

- The **Quality Nominee** is a member of the institution nominated by it to lead its quality assurance work and ultimately present its ASE return. S/he should not normally be responsible for the day-to-day management of its training programmes and pathways. This role is ongoing.

- The **Quality Adviser**, external to the institution and appointed by it. S/he acts as a critical friend: facilitating the review process, prioritising action and helping to shape up the annual ASE return. Quality advisers would normally be expected to serve for a period of three years.

3.11 Within the TEI, it will fall to the Quality Nominee to commission drafting from programme/pathway leaders and to ensure that conversations and input to inform the written returns take place to an agreed year-round timetable, building in key events such as staff meetings and tutorial interviews.

Sources and process

3.12 ASE is built around:

- the practitioners' evaluation of the year across the range of activities in which they are involved

- peer feedback on observation of teaching/learning and on formational activities (e.g. practitioners' contribution to collegial working relationships, work as a supervisor of formational group activity, tutorials with individual students, sermon/worship review classes, report writing)

- student feedback on teaching/learning and on formational activities

- input from a critical friend ('Quality Adviser')

- reflection on student recruitment, retention and achievement. Comparing the data from year to year helps the institution to evaluate aspects of its performance objectively and identify underlying strengths or weaknesses.

3.13 Drawing on the above sources and the material listed in the left-hand box in the ASE process flow-chart opposite, the programme/pathway leader completes one report per programme/pathway. The institution's Quality Nominee, supported by the external Quality Adviser, uses the reports as the basis for the institution's ASE and action summary.

3.14 Depending on the size and complexity of the institution and the training programmes/pathways it offers, it is likely that individual programme/pathway leaders will lead in the review of their own area(s) and the preparation of appropriate sections of the eventual document.

3.15 ASE can be conducted in a number of ways:

a. an annual away-day

b. a dedicated meeting of the Management Committee

c. consideration of key issues at routine meetings of committees through the course of the academic year

3.16 The structures and circumstances of TEIs may require different approaches than those above. It is recommended, however, that TEIs take a phased approach to ASE, allowing key business to be conducted through the course of the academic year which can then inform a more holistic and strategic discussion at a dedicated meeting or away-day.

3.17 The approach chosen by TEIs should ensure that all staff who have had the opportunity to teach or assess on a programme are given the opportunity to participate in some stage of the process.

3.18 Similarly, all TEIs must directly involve students in the ASE process. Where a TEI conducts its ASE solely at an away-day or committee meeting, student representatives must be invited to this meeting and TEIs must ensure that the timing of this meeting allows this. Where a TEI choose to adopt a phased approach to ASE, student involvement can be achieved through appropriate student representation on the departmental committees participating in the phased ASE.

The ASE questions

3.19 The standard ASE forms (parts A and B) and introductory guidance are available from Ministry Division.

3.20 Section A asks about the formational context, the development of ministerial skills and dispositions, and about governance: people and business management and support structures. It is to be filled in by the formational centre within a TEI, or by TEI where it is coterminous with the formational centre.

3.21 Some areas of enquiry in Section A will need differentiated responses. It asks about the formational centre and formational pathways and there may be different responses to make and actions to record in regard to i) full-time residential students; ii) those students whose learning is partly context-based ('mixed-mode'), and iii) others, probably with daytime employment or commitments, studying part-time on the 'course' model of week-night study and occasional full-day or weekend residentials.

3.22 One option is to fill in multiple 'section A' returns, one per group; but TEIs are welcome to take the more economical approach of a single consolidated return, commenting separately only as needed and making it clear in the response which group is referred to.

3.23 As governance applies at TEI as well as formational centre level there may be additional comments to make where a TEI is an umbrella body, such as a Federation or Regional Training Partnership, and these can be addressed as appropriate via the governance questions in Section A of the form.

Flow-chart showing the ASE process

Source material for programme/pathway reports (the owner and location of each should be documented and a set held as hard copy):

- Student documentation: handbook, induction
- Programme/pathway information
- student data – numbers, profile, sample of work
- feedback from students, peers and placement supervisors
- earlier self-evaluations, external reviews and action plans
- governance information: reporting structure, financial information, business plan

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- **Programme/pathway self-evaluation report**: one per programme/ pathway prepared by practitioner, signed off by Quality Nominee
- Each includes an action summary

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- **Institution self-evaluation report**, prepared by Quality Nominee in consultation with external Quality Adviser
- Includes an action summary consolidating key points from the programme/pathway reports

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Next steps

- Quality Nominee sends self-evaluation to Ministry Division
- Ministry Division forwards Section B self-evaluation (if relating to Common Awards programmes) to Durham quality assurance office
- Document plus any Durham/ Ministry response lead to follow-up action
- Cycle repeats annually
- Self-evaluation process builds up institution's learning over time and drives up standards and feeds into PER

3.24 Section B invites the TEI's reflection on its management and enhancement of the quality of teaching and learning. It asks how the year's review of taught programmes was conducted, how students were directly involved and the outcomes of that review; and about responses to external examiner and ULO reports, staff-student engagement, student progression and achievement, placements, learning resources, and support and development for teaching staff. As with Section A, it asks what issues have arisen and what actions are intended, and for a shareable example of good practice.

3.25 Section B is about academic programmes, not formational groups, so the differentiation will be between, say, students following the Common Awards diploma or degree, and other programmes. Again, separate bullet points in one return may suffice.

3.26 As the guidance within the ASE pro-forma indicates, it will be useful for the TEI to cite the sources that provide evidence for their response. These might be a staff/student handbook, minutes of staff or council meetings or other discussion, or student feedback. This provides a useful pointer for reviewers carrying out a PER, who may choose to request some of this source information as a supplement to the ASE, if not already provided as part of the PER documentation (Appendix A to this handbook).

ASE for IME2 (curacy training)

3.27 In 2018 a light-touch version of ASE was introduced for ordained ministry training in IME2, i.e. curacy training. Directors are asked to review their programme's objectives, priorities and needs via a short questionnaire, and to do via peer-review – that is, in partnership or conversation with a fellow practitioner who can help them to think through the issues; and to submit their completed questionnaire to Ministry Division, again by 30 November and for the information of the Quality in Formation Panel. For IME2 ASE returns there is one questionnaire (rather than parts A and B); there is no reporting link to Durham's Common Awards Office; and there is no direct feed into Periodic External Review.

4 PER timeline

4.1 Planning for a PER begins in the academic year preceding that of the review visit, the report is likely to be published some three months after the final PER visit, and there is then a process to follow up the report's recommendations. The indicative timeline below summarises the procedure set out in Sections 5 and 6.

Time	Action	Para
Preparatory		
Up to 1 year ahead of PER	• Scene-setting and planning meeting between Ministry Division staff and the principal and other staff members of the TEI in order to get a picture of its training patterns and contexts and to help plan the PER.	*5.8*
1-3 months after the planning meeting	• Institution reviews its timetable for the coming year and is consulted about its preferred dates for the review visits. • Ministry Division selects a senior reviewer and other review team members, liaising with Durham colleagues. • Ministry Division finalises and confirms the PER dates with team members and the TEI.	*5.10-5.13*
Briefing and training		
3-6 months before the PER visit	• Ministry Division briefs the Senior Reviewer and provides induction for team members, with input from the Durham Common Awards team. • Senior Reviewer to meet the TEI principal to familiarise him/herself with the institution, current issues and any concerns. • Senior Reviewer and Ministry Division staff to liaise with TEI and reviewers over practicalities for the PER – timings, accommodation, travel etc. • Institution to arrange accommodation, meals and private meeting room for the reviewers during their visit. • Ministry Division to consult stakeholders selected by TEI.	*5.31; 5.27* *5.31* *5.25* *5.25* *5.14*
6-8 weeks before the PER visit	• TEI provides PER documentation (some to be supplied by Ministry Division and Durham) for review team members and Ministry Division, preferably on line. See appendix A. • Documentation to include a detailed timetable of events, meetings and interviews for reviewers during the PER.	*5.16-5.17* *5.20*

4 weeks before the first PER visit	• PER planning meeting: team meets, supported by Ministry Division, for training and to plan the PER visit, allocating tasks and report drafting amongst members. • Ministry Division to prepare a drafting and editing timetable for report-writing from the PER visit through to publication, for agreement with TEI and review team.	*5.28-5.29* *6.5*
PER visits		
PER visit period	• PER visits by the Ministry Division-nominated reviewers (visit 1) and full team (visit 2) in the periods scheduled. • Ministry Division staff to ensure post-visit 1 debrief and communication of issues/questions to full team. • Ministry Division to contact TEI principal during review to check any practical concerns about progress.	*5.18-5.22* *5.21* *5.24*
Report production		
At end of PER visit 2	• Assessment meeting: review team meets Ministry Division staff facilitator to assess findings against each criterion and the supporting evidence, and plan report drafting.	*5.23; 6.1*
3 weeks after the PER	• Team members draft and e-mail their material to the Senior Reviewer within the first week or so. • Within two weeks of the final visit, the Durham team drafts its report, which serves as Sections E & F of the full report. • The Senior Reviewer collates, edits and produces a composite draft in week 3, including Durham material, and sends to Ministry Division.	*6.2-6.4* *6.3* *6.4-6.5*
4 weeks after the PER	• Staff scrutiny, queries to team and fine-tuning, plus ecumenical partners' input if applicable.	*6.3; 6.6*
5 weeks after the PER	• Draft report to TEI principal for his/her comment within 2 weeks of receipt.	*6.6*
2-3 months after the PER visit	• After further input and revision, and a 30-day period of leave for the TEI to appeal the final document if wished, the report is published for the House of Bishops and/or partner church leaders and, a week later, on-line.	*6.7; 6.17*

Follow up		
Within three months of publication	• TEI provides an action plan setting out in table form how it will address each of the report's recommendations, by when, and the responsible officer/body. • Ministry Division, Durham and Senior Reviewer review the action plan to ensure that it meets the team's concerns. *Only in the case of an overall No Confidence judgement:* • TEI to produce further quarterly progress reports	*6.17* *6.17* *6.22*
1 year after the PER	• TEI makes a brief written report of its progress, for approval by the Senior Reviewer and Ministry Division. *In the case of an overall Confidence judgement:* • Further follow-up only if there are issues to explore. *In the case of Confidence with Qualifications* • Follow-up visit by senior reviewer who will report on progress with implementing the agreed action plan. • Senior reviewer's follow-up report published on-line. *In the case of No Confidence:* • As above. If concerns continue, report to sponsoring church authorities – see para 6.22 & table.	*6.22* *6.18-6.22* *6.22*

5 Periodic External Review (PER)

5.1 External reviews take place every six years, in line with the PER cycle published on Ministry Division's quality assurance web pages.

Periodic External Review in brief

5.2 Review team members are drawn from a list of reviewers nominated mainly by diocesan bishops (and some by TEIs). Some members are provided additionally by Durham University where Common Awards form part of the review. The team is led by a Senior Reviewer.

5.3 They are briefed on their task by Ministry Division with input from Durham Common Awards staff. Reviewers receive documentation from the TEI, with some also supplied by Ministry Division and Durham (Appendix A). They visit on two pre-arranged occasions to meet students, staff, governors and other stakeholders and to see something of the life of the TEI; and draft a report that includes commentary and graded judgements against the PER criteria (Section 6), commendations of good practice and recommendations for development. After moderation and editing, the report is published and the recommendations are followed up by the TEI in line with an agreed action plan and timetable.

5.4 The PER framework changed significantly from 2016-17. As has been the case with Annual Self Evaluation since 2014-15, for TEIs that teach Common Awards it now combines ministerial and academic quality assurance. It organises the PER criteria into 6 headings and aims for a clearer focus on student outcomes than before. The criteria include guidance about the evidence supporting each one; and the default PER programme – though flexible - of two short visits by the review team seeks to demand less time from reviewers and TEI colleagues than before. The use of **Commendations** of good practice alongside **Recommendations** is also new.

Aims of Periodic External Review

5.5 The aims of Periodic External Review are

a) to assess the TEI's fitness for purpose in training for nationally authorised ministries – for the Church of England the focus is on ministries licensed under canon – and delivering its other educational and formational activity;

b) to engage with and comment on the institution's culture and practice of self-evaluation;

c) to commend examples of good practice; and

d) to make recommendations to enhance its life and work.

5.6 The role of reviewers is:

- to establish whether the relevant churches' educational and training requirements for ministry are being met (Appendices B-D)
- in the case of TEIs offering Common Awards programmes, to establish whether Durham University's standards for teaching and learning are being met;

- to encourage and help the institution to develop and exercise good policies and practices in regularly evaluating and enhancing its own work; and

- to advise the appropriate authority in the sponsoring churches of any matters of general concern arising from a periodic review.

5.7 Reviewers should form as full a view of the TEI's life and work as is reasonably possible: hence the two visits, to be scheduled at agreed times, with a period for reflection in between. Reviewers will need to sample or hear accounts of the TEI's range of activities, including reflection and ministerial formation groups and dispersed activities such as placements and locally-based teaching, as well as larger gathered events like teaching and worship.

Planning the review

5.8 **Planning meeting with the TEI**: Ministry Division will arrange a planning meeting with the TEI's principal and colleagues up to a year before the review is due. Members of Durham's Common Awards team will participate as needed, with a view to the University Partnership and Taught Programmes elements of the review (Section 7, criteria E and F). The aim is to get an up-to-date picture of the institution's size, its breadth of student intake, the types of ministry trained for (ordained, lay, pioneer) along with non-ministerial learning programmes, the number of training pathways and modes (graduate, post-graduate, full- and part-time), training contexts (including parish or other placements), academic awards, and relationships with HE and other partners.

5.9 The meeting will help to determine the scope of the review, the make-up of the review team in terms of skills/background and number of reviewers (paras 5.10-13), the appropriate advance consultations with stakeholders (5.14-15), the documentation required (5.16-17), and the timing and attendance for the two PER visits (5.19-22). While the basic approach will be the same in each case, the design of individual reviews will vary according to the nature of the TEI. Examples of those variations and, therefore, matters to explore in the meeting, are:

- TEIs offering programmes other than Common Awards. Where these are not HE-validated, criteria E and F still apply; but the enquiries around academic structures will be lighter, as will the requirement for documentary evidence. Where programmes are validated exclusively by another university, its academic QA procedures will also apply but should go some way towards meeting the PER requirements of sections E and F. In both cases there will be no Durham representatives on the review team.

- Where a curriculum is common to a number of formational centres within one TEI, the PER will look at teaching and learning across the whole TEI as a single exercise, addressing criteria E and F, but will consider the formational experience and governance within each formational centre individually (Section 7, criteria A-D). This should mean that the 'visit 2' series of interviews focusing on taught programmes (para 5.22) can be a single event, rather than repeated across formational centres. But it will be necessary for the lead staff of each centre and each training pathway to be represented at those interviews.

- Not all of the standard enquiries or supporting documentation in relation to governance, trustees and business planning will apply to a diocesan-run scheme (Section 7, criterion C).

- Reviews of partner churches' training institutions will require appropriate adaptation of the PER criteria regarding formational requirements, student outcomes, liturgical traditions and sponsoring church governance. There will also be some adjustment to the required evidence and visit-planning.

5.10 **Review dates and team members**: The TEI will be invited to suggest review visit dates that will best enable reviewers to gather evidence and observe activities. These dates will be agreed with Ministry Division and, as appropriate, Durham University. Ministry Division (and Durham) will appoint review team members, consult the TEI to ensure there are no conflicts of interest, confirm the dates with the TEI and review team, and arrange training and briefing for the reviewers.

5.11 The team's Senior Reviewer, who leads the review, is appointed by Ministry Division. The team will reflect the types of training and education being offered, and the sponsoring church denomination(s). Each team will normally include men and women, and both ordained ministers and lay people.

5.12 Ministry Division reviewers will include members experienced in the exercise of ordained and authorised lay ministry and the formation of others for ministry, theology in a professional context, the practice of adult education, business management, governance and finance. There will usually be 3-4 Ministry Division-appointed reviewers, or more in the case of TEIs with more than one formational centre, depending on size and complexity. There will be Ministry Division reviewers present at all review visits.

5.13 Durham University reviewers will include an academic lead (Common Awards representative) and academic team Secretary (Common Awards administrative staff). These reviewers will attend only the Taught Programmes review day ('visit 2'). Durham's further requirement for an external subject specialist will normally be met by one of the Ministry Division-appointed reviewers.

Gathering evidence

5.14 **Advance consultation**: the Senior Reviewers will seek views from the chair of the governing body and sponsoring diocesan bishops before meeting stakeholder groups and individuals during the first review visit. Alternatively, the views of bishops may be most conveniently sought as part of the written consultation that Ministry Division will carry out with selected external stakeholders, to help build the reviewers' picture of the TEI. Consultation will be via a brief pro-forma sent to a representative sample of the following:

- RTP colleagues
- Diocesan Bishops / Ecumenical leaders
- Diocesan Directors of Ordinands
- Former students
- Receiving incumbents
- Diocesan IME2 officers
- External Quality Adviser

5.15 Some of these people may also be present during part of the main review visit. The aim of advance consultation is to enable the reviewers to gather a broader range of evidence than is possible in person, in a transparent as well as efficient way. The pro-forma will invite consultees' views on the TEIs' formational aims, achievements, strengths and challenges, the effectiveness of its leadership and any current issues of concern/interest. Ministry Division will consult the TEI over the areas of enquiry and the consultees.

5.16 **PER background documents**: Approximately 6-8 weeks before the first of two visit periods, the TEI prepares the documentation set out at Appendix A, giving information about the TEI's activities, programmes and students. It is sent to the review team who will then have time to scrutinise the documents and to ask further questions of the TEI Senior Leadership team if necessary.

5.17 It will normally be most convenient to provide the documents on-line via a password-protected site e.g. DropBox, but the TEI should be ready to provide hard copies if requested. Each member of the review team will need access/ copies, as will Ministry Division and, where applicable, the Common Awards office.

Review visits

5.18 The standard approach is that two short visits are made to the TEI by the review team: the first ('visit 1') by Ministry Division-appointed reviewers, and the second ('visit 2') by Common Awards reviewers supplemented by members of the wider review team. 'Visit 2' may in fact come first or the two may be integrated into one sequence. The reviewers, supported by staff, will work together throughout the review and share emerging questions and findings as needed.

5.19 **Visit 1**, for the Ministry Division reviewers, will be residential. If is about understanding the formation offered by the TEI. It will normally last approx. 48 hours and will be built around attendance at a governors' meeting where possible and appropriate; but there will be flexibility depending on the nature of the TEI's training. It may be necessary to visit more than one location, and review team members can subdivide if needed. The aim is to enable reviewers to sample the life of the institution at each of its centres, including teaching, worship and social time, and to meet (mainly in small groups):

- the TEI principal (probably individually)
- some other teaching, management and administrative staff
- the Internal Quality Nominee
- Students (varying year groups, and possibly some spouses/partners)
- Home/training incumbents and placement supervisors

5.20 In order to achieve the best possible mix of observation and conversations, it is important for the Senior Reviewer, the TEI and Ministry Division to work together in advance to design the programme for the visit. By the time the full PER documentation is prepared, it should be possible to include a detailed timetable of events that the reviewers will observe and individuals and groups they will meet during their two visits.

5.21 Immediately after the first visit, Ministry Division will facilitate a debrief for the reviewers to identify emerging findings, areas to explore further and issues to feed back to the full team, either before or when the review team gathers for its second visit. There will be time after Visit 1 for the reviewers to dialogue with the TEI's senior leadership if clarification is needed on particular issues.

5.22 '**Visit 2**' will take place on a single day. It applies only to TEIs that offer Durham's Common Awards. It focuses on the TEI's delivery of those programmes and is essentially an academic curriculum review day. Often, it will be two or three weeks after 'visit 1' but sometimes the gap between the two visits will be longer, and sometimes 'visit 2' will be first. Both will normally be within the same academic term. It will be carried out by Durham-nominated reviewers, supplemented by other members of the Ministry Division review team. It will be a planned series of interviews and conversations, as follows:

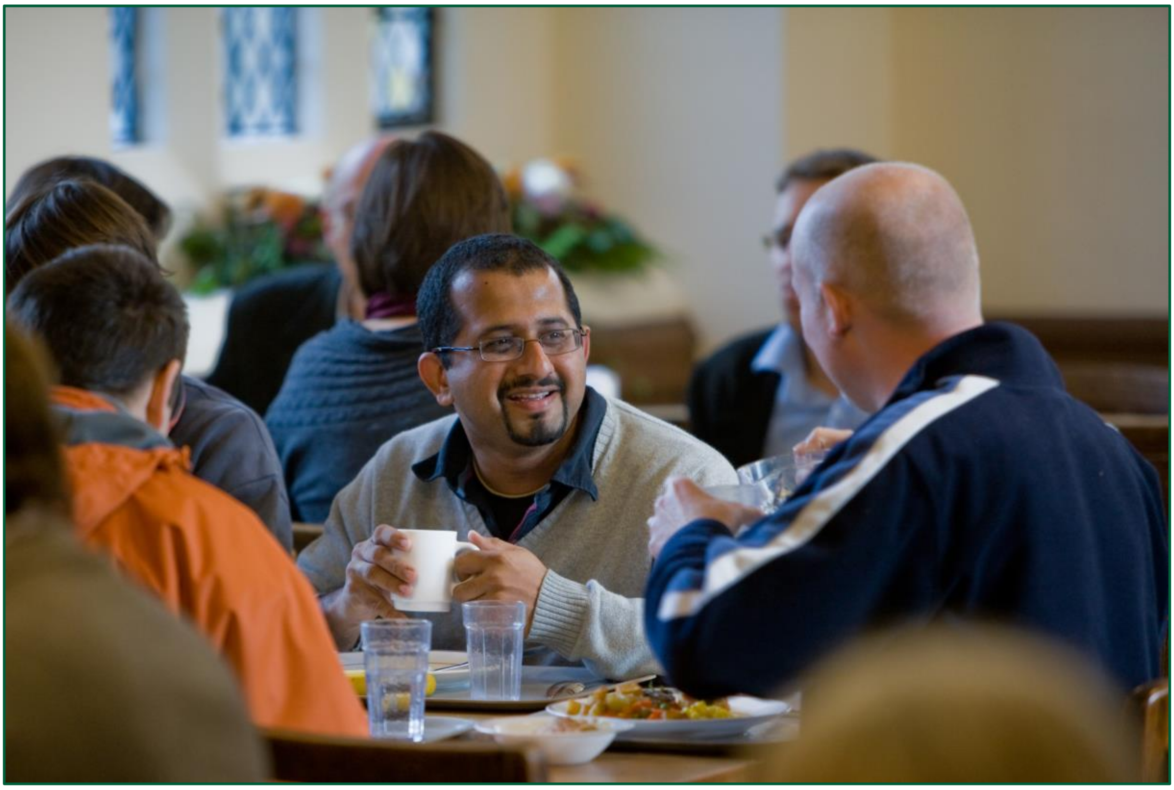
a) TEI senior management: to focus on any issues arising with the operation of the Durham-TEI partnership (financial, management, staff, partnership changes etc) – PER criterion E.

b) Representative sample of TEI students. Depending on the range of academic and ministerial tracks offered by the TEI this may need more than one meeting, but the normal expectation is that one meeting will suffice.

c) Meeting(s) with programme staff, to focus on curriculum and programme issues - PER criterion F.

5.23 The above sequence will be preceded by a planning meeting for the reviewers and followed by a final debrief for the team, facilitated by Ministry Division, and a conversation between the Senior Reviewer and the TEI principal to conclude the visit.

5.24 During the first review visit, Ministry Division will contact the principal to check if there are any issues arising from the conduct of the review. Any issues will be relayed back to the Senior Reviewer. At any point Ministry Division staff are available should either the TEI or reviewers wish to ask questions or raise concerns.



5.25 The TEI is asked to provide residential accommodation for the reviewers during visit 1 (and visit 2 if needed) and a private meeting room for use as the team's office base. The cost of accommodation and of meals for the reviewers is borne by the TEI. The TEI should confirm arrangements via the Senior Reviewer. Outside the period of the review visits, reviewers' travel costs are met by the sponsoring church, via Ministry Division in the case of reviews of Church of England training (para 5.30).

Training and support for reviewers

5.26 Reviewers are asked to reach sound and evidence-based judgements. They should keep a proper detachment from those within the TEI; but this should be compatible with a stance towards the institution and its people that is supportive and critically encouraging, not adversarial.

5.27 From time to time there will be a general **induction day** which new reviewers are encouraged to attend before conducting a review. It will cover the principles of external review: the educational/policy background, current issues, and practical guidance. The Ministry Division will work with Durham colleagues on induction.

5.28 In addition, each PER will be preceded by a **team training and planning day** which Ministry Division and the Senior Reviewer will arrange for all review team members. It will include

- an update and review of the principles of PER
- briefing on the context of the institution and on sponsoring church and educational policies
- planning for the review
- allocating responsibilities to each reviewer
- agreeing the timetable for the drafting of the report.

5.29 The team training day will normally be approximately 4-6 weeks before the start of the review visit. By this stage the institution will have prepared its review documentation (Appendix A) and sent copies to the review team and Ministry Division. It will be helpful for team members to look through this material beforehand and bring to the training day documents that will help with planning, such as the institution's schedule of events and locations.

5.30 Reasonable travel expenses for reviewers, including the cost of subsistence while travelling, are met by the churches. Claims should be made to the church on whose behalf the reviewer is working. Receipts must be provided wherever possible.

The role of the Senior Reviewer

5.31 The Senior Reviewer will be briefed by Ministry Division well before the review. S/he also visits the TEI in advance to meet the principal and staff in preparation for the review. S/he is responsible for liaison between the team and the TEI before and throughout the review visit, and with the staff of the Ministry Division and the equivalent bodies in the partner churches. The Senior Reviewer should:

i) write to the chair of the TEI's governing body to ask whether the governing body wishes to draw the attention of the reviewers to any specific matter;

ii) as part of the advance consultation exercise outlined at 5.14, seek the views of at least some diocesan bishops and/or the relevant authorities in the other churches who sponsor candidates in the institution concerned;

iii) ensure that the review programme allow enough opportunity for the reviewers to meet members of the governing body, the staff of the institution, the whole student body and other appropriate people; and

iv) ensure that emergent concerns are discussed with the principal during the review.

5.32 In terms of managing matters well for those in the TEI under review, the Senior Reviewer is the person with whom to raise any immediate concerns about the process during the visit. Ministry Division staff are available to advise at any time.

5.33 The Senior Reviewer is also responsible (Section 6) for drafting the report in consultation with the other reviewers, for taking its revision through the editing and scrutiny phase; and for the follow-up process.

Reviewers' code of conduct

5.34 Reviewers must declare any potential conflicts of interest or loyalty with regard to an institution they have been invited to review. They should not:

- hold a teaching or governance role in the TEI nor have done so at any time in the past five years
- be paid by the institution in any other professional capacity nor have been so in the last five years
- have close family ties with trustees, staff or students
- undertake consultancy type work for the institution or others linked to it (e.g. its regional training partnership) for the rest of the 6-year PER cycle.

5.35 Reviewers must uphold professional standards in their handling of the review and their dealings with people in the TEI and with one another, and must ensure that staff and students are treated fairly and benefit from their review. In line with Ofsted's code of conduct, reviewers are asked to:

- evaluate objectively, be impartial and have no connection with the provider which could undermine their objectivity
- report honestly, ensuring that judgements are fair and reliable
- carry out their work with integrity, treating all those they meet with courtesy and sensitivity
- do all they can to minimise the stress on those involved in the review, and act with their best interests and well-being as priorities

- maintain purposeful and productive dialogue with those undergoing the review, and communicate judgements clearly and frankly
- respect the confidentiality of information, particularly about individuals and their work.

5.36 While it is not possible to say what this might mean in every context, some general points may be helpful. Impartiality and objective judgement might, for instance, mean setting aside a personal bias in favour of, or against, a given church tradition in order to assess whether, within the permitted bounds of the sponsoring denomination, the TEI under review does its job well. Other aspects of unconscious (or conscious) bias might also come into play. Honest and fair reporting is largely about a sound base of evidence. Unsupported judgements and conjecture should be avoided.

5.37 Minimising stress for participants under review will need active care on the part of the review team and especially the lead reviewer. PER preparation and visits are intensive and can be stressful despite the best intentions. Interviews should run to an agreed length and format (number of participants; sequence of topics) and the lead reviewer or chair should check at the start that participants understand the plan and are content with it. Care in the conduct of the interview should be taken if the number of interviewers in a conversation is significantly more than the number of interviewees – as may well be the case if an interviewee holds multiple responsibilities. So far as possible, the interview environment should be reasonably comfortable in temperature, air, light, seating, and water/drinks etc. Short breaks should be included if needed. Questioning, while clearly seeking information, should be courteous and considerate, and answers be listened to with care.

5.38 Some of the potential for stress around a PER visit lies at the preparatory stages and can be minimised if Ministry Division and the TEI liaise effectively over PER documentation and advance planning and diary-management for the visit programme and lining up the people involved (para 5.20). Even so, it is inevitable that sometimes the review team will need to make additional requests for information from the TEI or for opportunities to follow up issues in the course of their work. However, the review team should bear in mind the impact of such requests on the workload of the TEI staff.'

5.39 No final judgement will be communicated until the PER report appears in writing, preceded by a provisional outline of the main findings 1-2 weeks after the team's final visit; but there should be regular intervals built into the review visit for the lead reviewer to debrief informally with the principal and to give a sense of how the team's task is progressing and areas where further evidence would be welcome.

5.40 As part of their PER evidence, reviewers will have access to personal information about students and staff – CVs, written reports and reflections about students' formation, conversations and the like. This material should be respected as confidential and stored securely, identities should be protected as appropriate in discussion and in the reviewers' eventual report, and all personal print material should be destroyed and electronic files deleted once the report has passed beyond the possibility of appeal and is published.

6 Writing the report and follow up

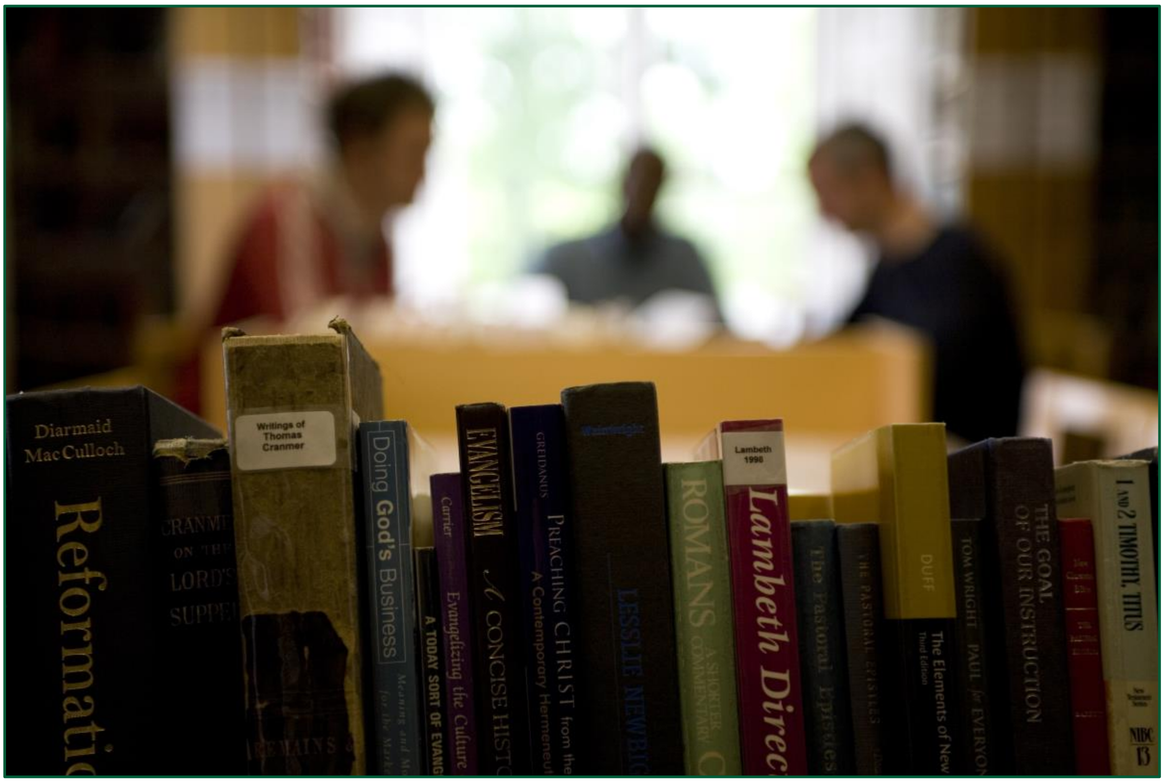
Drafting process and timetable

6.1 At or shortly after the end of the final review visit the full team, including Durham representatives where applicable, will hold an assessment meeting, facilitated by Ministry Division staff, at which the team will provisionally agree its commendations and recommendations and the outcomes against each criterion and overall. These can be revised during the writing up period in the light of the full range of evidence collected by the review team.

6.2 Report drafting by the reviewers takes place in the two or three weeks after the assessment meeting. Since the report is important for the TEI's continuing work and development and may have a significant effect on its reputation, care needs to be taken over the report's preparation and due time given to reflection before it is finalised. It should give a rigorous, evidence-based assessment of the TEI against the criteria.

6.3 Where the TEI under review offers Common Awards programmes and the review team includes Durham-nominated members, the Durham reviewers will prepare their own report on the TEI-university partnership and the delivery of taught programmes, normally within three weeks of the final PER visit, for Durham's internal quality assurance purposes. The body of that report also serves as Sections E and F of the PER report and so will be passed to the Senior Reviewer, along with other reviewers' material on Sections A-D, to edit and incorporate into a single composite report of the full review team.

6.4 After editing, followed by staff scrutiny and moderation, the aim is that the draft report should reach the TEI within 4-5 weeks of the final review visit, for factual comment and queries.



6.5 Below is an indicative timetable; but in each case Ministry Division will agree with the review team and TEI a timetable from review through to report publication, building in any adjustments for holiday periods.

Task	When / duration	Who
Assessment meeting	At or soon after the end of Visit 2	Full review team plus Ministry Division staff
Write draft report (1-2 weeks for team drafting, 3rd week for senior reviewer to edit and consolidate)	**2-3 weeks** after meeting	Review team led by Senior Reviewer
Scrutiny at staff level, followed by Senior Reviewer's response drawing in other team members as needed	**1 week** after first draft	Ministry Division staff and/or equivalent staff of partner church
Comment by chair of governing body and principal	**2 weeks** after draft report is finalised	Chair of governing body and principal
Response by Senior Reviewer and readying for final approval	**1 week**	Senior Reviewer
Final approval by chair of Quality and Formation panel	**1 week**	QaF chair
Leave-to-appeal stage	**1 month** if not waived	Chair of governing body and principal
Production of printed report	**1 week**	Ministry Division
posting on church website(s)	**1 week**	sponsoring churches

6.6 The report is drafted by the team under the leadership of the Senior Reviewer. Teams are encouraged to work collaboratively on drafting. During and between the two review visits, wherever possible, it is important for the Senior Reviewer and/or team to discuss significant observations and concerns with the principal and other relevant parties. However, the report can include issues that have not been discussed with the TEI during the review.

6.7 When the draft report comes to the chair of the TEI's governing body and the principal for checking it has gone through editing and staff scrutiny by Ministry Division. While it is not envisaged that significant changes will be made at this stage, factual inaccuracies will be corrected and other comments will be considered by the Senior Reviewer and any changes made will be at his or her discretion.

6.8 Final responsibility for the text of the report lies with the Quality and Formation Panel. Reports are signed off by the chair or another panel member. After the TEI's 30-day appeal period has elapsed (or been waived) – see paragraph 6.16 - The report is then published in hard copy for advance circulation to the TEI and to those members of the House of Bishops who have requested it, followed by on-line publication a week later.

Report structure and outcomes

6.9 The report should adopt Ministry Division's standard structure and presentational format – a template will be provided electronically, and staff will help with formatting. The report should contain:

a) A **summary** that includes the following:

i. Introduction – very brief history of the TEI, types of activity, current numbers of main types of student

ii. Note of the main documents reviewed and the meetings and conversations in which the review team took part and the activities observed: i.e. the review's evidence base.

iii. Summary of outcomes, concluding 'the review team regards [Institution] as fit/not fit for purpose for preparing candidates for ordained and licensed ministry

iv. Table of outcomes by criterion and overall outcome

v. Response to the last review – summary of how the TEI implemented the recommendations

vi. Strengths: 'The strengths of [Institution] lie in…'

vii. Areas for attention: 'The areas for attention are….'

b) **Full report**: An introductory section which summarises the main activities of the institution and the current number of students and includes general contextual observations.

c) Main body of the report ordered under the headings of the criteria and a judgement at criterion level expressed using the categories Confidence, Confidence with Qualifications, No Confidence.

d) To include evaluation, under relevant headings, of the TEI's practice of self-evaluation.

e) **Commendations** (in bold) of the TEI's strengths and good practice where applicable throughout.

f) Numbered, clear and concise **Recommendations** (in bold) for addressing any issues identified by the review and for enhancing the life and work of the institution. These may be either for development (where required standards are not fully met) or enhancement of existing good practice.

g) Concluding list of recommendations copied across from f)

6.10 Review teams must comment under each of the criteria in bold text in the main PER criteria document (A1, A2 etc, summarised at Section 7). In doing so they should consider each of the points in roman numerals, but need not dedicate a separate paragraph to each. These should be viewed as indicators of good practice, not an exhaustive checklist of areas for commentary.

6.11 Commentary should be affirming and constructively critical. Under each heading reviewers should:

i. affirm the TEI's strengths,

ii. test its attainment based on evidence, and

iii. explore what opportunities it has identified for developing further.

6.12 PER reports on Church of England training institutions are published in print and on line by Ministry Division. Reports on institutions training for ministry in a partner church are published by that church.

6.13 While comment may be made on the exercise of roles within a TEI (e.g. that of principal or other roles), individual members of the staff should not be referred to by name in a critical context.

6.14 Occasionally it may be appropriate for very sensitive matters to be dealt with in a confidential annex to the report. In all cases this will be available to the Chair of the governing body and the appropriate authority in the sponsoring churches. Any individual named should receive a copy of the annex.

6.15 Reviewers apply the following set of outcomes, developed from those used by the QAA:

Overall outcome	
Confidence	Commendations and a number of recommendations, none of which question the generally high standards found in the review.
Confidence with qualifications	A number of commendations and recommendations, including one or more of substance that questions the generally acceptable standards found in the review but which the reviewers believe can be rectified or substantially addressed by the institution in the coming 12 months.
No confidence	A number of recommendations (and possible commendations), including one or more of substance which raise significant questions about the standards found in the institution and the capacity of the institution to rectify or substantially address these in the coming 12 months.
Outcome at criterion level	
Confidence	This aspect of the institution's life shows good or best practice.
Confidence with qualifications	This aspect of the institution's life shows either (a) good or at least satisfactory practice in general but with some unsatisfactory elements, or (b) some unsatisfactory practice; but the reviewers believe the institution has the capacity to address the issues substantially within 12 months.
No confidence	This aspect of the institution's life shows 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.

Appeal procedure

6.16 In the first instance we will seek to resolve disputed issues, if any remain after the report has been finalised by the Quality and Formation panel for publication, through dialogue between the Senior

Reviewer, supported by Ministry Division staff, and the TEI. But if an institution wishes to pursue an appeal against the report in its final form, the following steps will apply.

i **Application for permission to appeal**. The TEI will have seen an earlier draft for factual checking and comment. If it is dissatisfied with the final report and wishes to appeal it should apply to Ministry Division within 30 days with a brief statement of reasons. The purpose is to establish if an appeal would have a reasonable prospect of success. The application to appeal will be determined by a sub-committee of the Church of England's Ministry Council or equivalent body in the case of a partner church.

ii **Appeal panel**. If the application is granted, an appeal panel will be set up by the appropriate authority in the sponsoring church as soon as possible (target of one month) and the report will not be published pending the outcome of the appeal.

iii **Outcome** If an appeal fails, the original review report will be published, subject to a final right of appeal (below). If it succeeds, the panel may remove material from a review report or substitute for any conclusion of the report such other conclusion as it thinks just, and the report will be published as amended. Alternatively the panel may set aside the entire report and commission a fresh review and report by a new team of reviewers.

iv **Further appeal**. If permission to appeal is refused there is no further right of appeal. If it is granted and the institution is dissatisfied with the appeal panel's determination as to the amendment or removal of material, it may within 14 days apply to the body of final appeal for the relevant church (in the case of the Church of England, the Ministry Council). It may not appeal against the decision to set aside a report and commission a fresh review.

Publication and follow up

6.17 On receiving the published report, the TEI's principal and governing body are asked to draw up and send to Ministry Division, within three months, an action plan stating what actions will be taken in response to the recommendations, by whom and to what timescale. After initial review by Ministry Division and (where applicable) Durham University's Common Awards team, the action plan will be forwarded to the Senior Reviewer who will check that it is adequate as a response to the recommendations made and, subject to any agreed adjustment, adopted by the TEI as final.

6.18 Other than where the TEI has received an overall Confidence outcome, a follow-up visit is carried by the Senior Reviewer, possibly with a colleague from the review team, 1 year after the review. Before the follow up visit the TEI makes a report on progress on its action plan. The Senior Reviewer then conducts the follow-up visit in order to report on the progress made in acting on the report's recommendations.

6.19 The Senior Reviewer writes a brief follow up-report on behalf of the Quality in Formation Panel, drawing attention to those recommendations which have been met and those where action is still required by the TEI. As with PER reports, follow-up reports are reviewed in draft by the TEI for factual accuracy and wider comment, finalised, circulated to the appropriate church authorities and published on the website of the sponsoring church.

6.20 If the response has not been satisfactory a further follow-up visit will take place and/or the issues will be reported to the sponsoring churches.

6.21 The Quality in Formation Panel will bring any major issues to the attention of the sponsoring churches.

6.22 The follow-up stages, with outcomes, are summarised below:

<table>
<tr><th>Outcome</th><th>Action within three months of PER visit</th><th>Further action within one year</th><th>Action one year after review</th><th>Following years</th></tr>
<tr><td>Confidence</td><td>TEI's action plan with response to each recommendation, whose action and by when</td><td>None</td><td>TEI's progress report for sign-off by Senior Reviewer if satisfactory.</td><td rowspan="3">No further follow-up until next periodic review other than TEI's annual self evaluations returned to Ministry Division (and Durham), partly informed by PER and setting out proposed and implemented actions.</td></tr>
<tr><td>Confidence with qualifications</td><td>As for Confidence</td><td>None</td><td>TEI's progress report against action plan.

Follow up visit to TEI by Senior Reviewer and possibly one other member of team.

Senior Reviewer's follow-up report for publication.</td></tr>
<tr><td>No confidence</td><td>Ministry Division to report PER outcome to sponsoring church authority/ies

Action plan from TEI showing how recommendations will be addressed within a maximum of 12 months</td><td>TEI's quarterly progress reports to Senior Reviewer and Ministry Division

Report on progress made against the action plan</td><td>Follow up visit by Senior Reviewer and other members of team as required.

Follow up report for publication.

If concerns continue, formal report to church authority/ies. Outcomes could include bringing forward next PER, or withdrawal of recognition by sponsoring church.</td></tr>
</table>

7 Periodic External Review criteria

Underlying principles

7.1 Periodic External Reviews aim to recognise an institution's strengths and help it to address areas for development. They are carried out to the PER criteria summarised below. Reviewers may also address any other relevant issue which causes concern. Institutions are asked to co-operate fully with the review team.

7.2 In each section, reviewers are asked to relate their findings to the reflections and actions in the institution's Annual Self Evaluations. Reports should include Commendations of good practice and Recommendations for development.

7.3 The full PER criteria including guidance about how reviewers will test each area and gather evidence are at https://www.churchofengland.org/sites/default/files/2018-01/PER%20criteria.pdf. The guidance indicates which of the PER documents (Appendix A), discussions and observed events are likely to be most helpful as evidence for each criterion. TEIs are not asked to organise further sets of evidence and conversations for each of the criteria. For convenience the criteria are summarised below, but reviewers are asked to work to the full criteria document.

Section A: Formational aims

A1. The TEI's formational aims are clearly stated, understood and owned within the TEI.

- Reviewers will consider the TEI's strengths in shaping and communicating its formational aims, and the opportunities it has identified for development in this area. They will use the evidence of the TEI's policy documents and prospectus and its communication of aims to the staff and student community.

A2. The TEI's formational aims are appropriate to the ministerial training requirements of its sponsoring church denominations.

- Reviewers will look for evidence of the TEI's regular review of its aims and their appropriate reshaping in line with church thinking.

A3. The TEI's aims, activity and achievement are understood and supported by wider church audiences.

- Reviewers will look for evidence that the TEI seeks to inform its public profile positively, cultivates external stakeholders and is pro-active in promotional and recruitment activity.

Section B: Formational context

B1. The TEI draws on partnership with theological educators in the region and local faith and community organisations to enhance students' formational opportunities.

- Reviewers will consider the TEI's strengths in creating a formational context for students' learning and development. They will draw on evidence of engagement in effective partnerships including with the RTP, churches, civic and community organisations.

B2. There are well understood and embedded practices of corporate life, so as to enhance the process of students' formation.

- Reviewers will consider evidence of appropriate policies for the welfare of the TEI community, including its diversity, safeguarding practice, and provision for spouses/family members.

B3. The provision of public social and private living accommodation is satisfactory [see also E3 for teaching accommodation].

- Reviewers will consider the suitability of accommodation including provision for the needs of users with disabilities, the adequacy of chapel space, and maintenance and development plans.

B4. The TEI's corporate worship and liturgy are balanced in range and tradition, including authorised and innovative rites.

- Reviewers will consider the worshipping community's inclusivity in gender and tradition. Church of England reviews will comment on the use of BCP rites.

B5. Staff model appropriate patterns of spirituality, learning and reflection.

- Reviewers will draw on documentary evidence, observation and conversations.

Section C: Leadership and management

These criteria should be applied proportionately to the size and nature of the institution under review: college, regional course or diocesan scheme.

C1. The TEI has clear and effective governance structures.

- Reviewers will look for evidence of clear management, administrative and financial structures and appropriate accountability.

C2. The TEI has effective leadership.

- Reviewers will consider evidence that the principal and leadership team work well together and with the governing body, and that the TEI has clear strategic direction, a widely owned vision for excellence and a good motivational climate.

C3. Trustees are appropriately recruited, supported and developed.

- Reviewers will seek evidence that trustees have appropriate skills and engage positively with their role.

C4. The TEI has effective business planning and fundraising.

- Reviewers will look for evidence of business and strategic planning around resources and commercial/financial opportunities and threats, and of actions followed through.

C5. The TEI has sound financial and risk management and reporting.

- Reviewers will look for evidence of effective budgeting and management accounts, timely annual financial reporting, and risk management processes.

Section D: Student outcomes

D1. Students are growing in their knowledge of Christian tradition, faith and life.

- Reviewers will consider the TEI's strengths in shaping students' knowledge, skills and dispositions in line with sponsoring church requirements. They will look for evidence of students' generous respect for the church's diversity of practice and belief, and development as theologically reflective practitioners.

D2. Students have a desire and ability to share in mission, evangelism and discipleship.

- Reviewers will seek evidence that students are prepared for a world-facing ministry, with a readiness to learn about and teach the faith and to help others grow as Christians.

D3. Students are growing in personal spirituality and engagement with public worship.

- Reviewers will look for evidence that students are involved in preparing and leading worship, including public prayer and preaching, are rooted in corporate prayer and worship and are growing in personal spirituality so as to inform their relationship with others and engagement with the world.

D4. Students' personality, character and relationships.

- Reviewers will look for evidence that students are teachable, resilient and stable in the face of pressure and change, can learn from others, self-reflect critically, sustain healthy relationships and observe professional boundaries.

D5. Students are developing in the dispositions and skills of leadership, collaboration and ability to work in community.

- Reviewers will look for evidence of students' growth in leadership capacity and collaborative disposition, and readiness to look for and enable the gifts of others.

D6. Students show a calling to ministry within the traditions of the sponsoring church.

- Reviewers will look for evidence of students' belief in their calling, willingness to be obedient and accountable within the framework of the sponsoring church, and understanding of the nature and scope of public ministry within it.

D7. [Pioneer ministry training only] There is evidence that pioneer ministry students have enthusiasm for and skills in ministry and mission in unfamiliar contexts, and are flexible, resourceful and innovative in their approach to mission and ministry.

D8. The TEI has clear and robust procedures for the end-of-training assessment of students' knowledge, skills and dispositions, and reporting on students' achievement.

- Reviewers will look for evidence of effective ongoing and summative formational assessment processes by the TEI, in line with IME1 reporting criteria.

D9. The student has, during and at the end of initial training, a personal learning plan or other clear basis from which to learn and grow further in ministry and discipleship.

- Reviewers will draw on evidence from discussions with tutors and students.

D10. The TEI learns from the pattern of its students' ministerial and formational achievement and acts on areas of particular need.

- Reviewers will look for evidence that the TEI draws on appropriate sources of information to inform the development of its training programmes, and that students contribute to this.

Section E: Partnership with university

E1. Quality control and assurance procedures governing the partnership are robust.

- Reviewers will draw on evidence including annual self evaluation, recruitment and admissions processes, assessment, and involvement of students and external parties in quality management.

E2. Overall provision for academic and pastoral support and guidance is adequate.

- Reviewers will look for evidence of welfare support and information and feedback for students, including identifying and addressing specific needs, complaints and appeals process, reasonable adjustments for students with disabilities.

E3. The overall learning support and infrastructure in relation to the ability to meet requirements for awards are adequate.

- Reviewers will consider library and IT resources and teaching facilities, and evidence that the TEI addresses student concerns around learning facilities.

E4. The overall staffing (academic and support) in relation to the ability to meet requirements for awards is adequate.

- Reviewers will look for evidence of appropriate staff qualifications and capacity, mentoring and developmental opportunities, support staff provision and equality and diversity policies.

E5. The TEI has appropriate mechanisms to ensure the accuracy of all public information, publicity and promotional activity relating to the partnership.

- Reviewers will look for evidence of systems for the management of public information and promotional activity and (in the case of Common Awards) of processes for Durham University approval where needed.

Section F: Taught programmes

F1. The programme is viable in terms of market and likely numbers of entrants.

- Reviewers will look for evidence of viable cohort size and continuing demand from students and sponsoring dioceses, and of the TEI's strategic and responsive approach to student recruitment.

F2. The structure and design of the curriculum are appropriate to the aims and learning outcomes, and to the target student body.

- Reviewers will look for evidence of appropriate programme and module design and content, suited to the target students and enabling their progressive development of study skills and critical thinking; and that students have been involved in the programmes' design and development.

F3. The programme employs teaching, learning and assessment methods that will enable the learning outcomes to be achieved by typical students and that achievement to be measured.

- Reviewers will look for evidence that teaching, learning and assessment methods are effective and suited to student needs, and that changes in the balance of teaching and learning during the programmes support students' development.

F4. There are appropriate arrangements for placements.

- Reviewers will look for evidence that the role of placements and their contribution to the learning outcomes are understood, that their assessment is moderated and quality assured, and that there is sufficient academic and pastoral support for students on placement and reasonable adjustment for those with specific needs.

F5. The programme appropriately addresses the University's Principles for the Development of the Taught Curriculum.

- Reviewers will look for evidence that learning, teaching and assessment methods encompass research-led education, that students are helped to develop research-based study skills and that the TEI's practice and policy support academic staff in engaging in research and teaching at a high level.

F6. The programme is subject to appropriate processes for curriculum review, including mechanisms for student representation and engagement (see also E3).

- Reviewers will look for evidence that review processes include student input and the effective use of module and programme evaluation questionnaires.

8 Applications for new training provision for ordained ministry in the Church of England

8.1 Alongside ongoing quality assessment for all established training, Ministry Division is responsible to the Quality in Formation Panel for approval to new training proposals.

8.2 In principle, all new provision is welcome. The Council would welcome applications which contribute entrepreneurial vision and fresh thinking. In the light of the new ecology of training envisaged under Resourcing Ministerial Education, these new guidelines for the approval of training pathways have been drawn up. However, the panel will wish to be assured that a new proposal in some way adds value to the training that is already available within the church, whether by meeting local needs or training for a specific kind of ministry; that it has a coherent educational and formational programme; and that it is viable in terms of cost and likely trainee numbers and regional support.

8.3 Those proposing **new training provision** are urged to make contact with the Ministry Division at an early stage of their thinking to discuss informally their proposals and the procedure for application.

8.4 There are three stages of the application process:

a) **in principle agreement**: an outline proposal should be submitted to the Ministry Council setting out the proposal with reference to the criteria below.

b) **approval**, to include detailed scrutiny of curriculum, governance and finance proposals where these are needed. The documentation required will include the standard application form (via Ministry Division's website) setting out the ministry/ies trained for, programme design, content and academic award, supporting resources, expected numbers and cost. Any further information needed will be advised by the Quality and Formation Panel but may include validation approval from Durham University, a business plan and (for new institutions) an explanation of the governance arrangements.

c) **review after three years**: approval will normally be given for a three-year initial period. At that stage the provision will be reviewed and will either be confirmed or approval withdrawn.

Consultation

8.5 Ministry Division will contact the affected dioceses, training institutions and RTPs. In addition, it will put up a page on its website to give access to a summary of new proposals.

8.6 This will mean a period of consultation will need to be built in to the consideration of new proposals. There will normally be a two-month period for comment and some time to evaluate those comments. The results of the consultation will then be fed into the decision-making process of the Ministry Council.

8.7 In order to allow for the approval process to take place and for candidates to be recruited, applications will normally need to be with the Ministry Division in September of one year if students are to be admitted to new provision in the following September.

Criteria for evaluating new training provision for ordained ministry

8.8 The guiding criteria are:

1) **Collaboration:** New applications will be required to demonstrate that the pathway is the result of a collaborative partnership between Dioceses and TEIs to ensure that the pathway meets the needs of the wider church. In addition, wherever possible, it is hoped that pathways will be developed through the efficient sharing of resources between TEIs in order to promote the good practice of collaboration.

2) **Contribution to the development of training and ministry**

- added value above existing provision of training
- contribution to new patterns of ministry

3) **Education**

- broad based theological and ministerial programme which will enable the candidate to achieve the learning outcomes
- structured programme which enables candidates to complete level 5 (DipHE or equivalent), or above, by the time of ordination
- viable cohort size of ordinands (normally a minimum of 8-10) to enable a good exchange of views, perspectives and knowledge
- an approach to learning and formation which will instill good habits of continuing learning and development

4) **Formation**

In addition to 3 above:

- how does the pathway meets the formational criteria at the end of IME 1?
- a pattern of life and worship (communal and individual) which will deepen Christian discipleship and prepare candidates for the beginning of a representative ordained ministry
- appropriate use of residence or gathered time to enable these aims
- viable cohort size, as above, and continuity of group life; and focus on formation via group or other forms of corporate life, to enable candidate to experience and interact with a range of views and of expressions of church
- a variety of contextual and placement experience to enable candidate to be equipped for a ministry within the wider church

5) Institutional sustainability and governance

- realistic staffing and costing of the proposal
- outline of risks and how they might be mitigated
- demonstrating how connections are being made between the TEI and those Dioceses with whom it is in partnership
- where applicable, demonstration of how the pathway and TEI fit within a robust Common Awards Management Board structure which allows for transparent and clear lines of responsibility between the TEI and Durham University.

6) Cost to the national church

- Under RME, the costs of training pathways are to be met by the Dioceses so evidence will need to be shown for diocesan support for this new training pathway.
- costs to be in line with comparable provision according to focus of ministry (potential incumbent, assistant minister, pioneer minster, locally deployed)
- cost to be affordable within the limits of the age banded funding

7) Consultative process

- In considering new proposals the Ministry Council should seek the views of stakeholders in a way which informs but does not necessarily determine the outcome.

Appendix A

Periodic External Review documentation

Please provide the following background material for reviewers. This will be required approximately 6-8 weeks before the review visit. *Not every item is applicable or required in every case. At the preliminary planning stage of the review, Ministry Division will discuss and agree with the TEI the documentation needed for the Review by the Division and Durham University's Common Awards team (where relevant).*

1. INFORMATION TO BE PROVIDED BY THE TEI

Institution, formational aims and community

a) A two-part Self-Evaluation Document containing:

- 1: a 2-page (maximum) 'SWOT' commentary on key issues and challenges in the view of the TEI in relation to its **educational** provision, enabling the TEI to identify strengths and weaknesses and to offer the review team areas to focus on.
- 2: a **formational** scene-setting overview of approx. 2,500 words to answer the following questions, drawing critically on the Annual Self Evaluation forms:

  i. What are your hopes as an institution for the next 5 years, what resources do you need to realise them, and how are you working to ensure the longer-term sustainability of your institution?

  ii. What partnerships with faith and community organisations are you developing so as to enhance the world facing formational opportunities for students?

  iii. What lies at the heart of your vision for the formation of your students for ministry?

  iv. In what ways do your formational activities reflect the strategic aims and priorities of the sponsoring church? For example, in training for Church of England ministry this might include some reflection on the church's developing recognition via *Resourcing the Future* that it needs ministers who are missional, flexible, adaptable and collaborative.

  v. What patterns of life do teaching staff model to students in your institution?

This – and perhaps (b) - should be the only new document to be written for the review.

b) A mapping document of the formational criteria expected at the end of IME1 for reader ministry or ordination against the formational programme of the TEI

c) The institution's prospectus and/or other publicity material.

d) Staff/student handbooks and any other published guides relating to the institution's corporate life e.g. code of conduct, harassment, equal opportunities.

e) The TEI's worship policy document including an account of the pattern of worship, rites used and frequency, and documentation on training for leading public worship.

Taught programmes

f) Teaching timetable covering the period of the review visit.

g) TEI's academic policies: APL, Admissions, Over-length work; Quality assurance of assessment (i.e. marking and moderating/second-marking practices, feedback), placement learning.

h) Most recent report from QAA visit if applicable

i) Representative sample of standard APL claims processed by the TEI

j) Representative sample of concessions produced by the TEI

k) sample (3-4 items) of marked students' work with tutors' written feedback

l) Sample (3-4 items) of students' written reflections on their learning and formation

Governance and management

m) A diagram of the TEI's organisational structure and/or committee structure

n) Constitution/governing documents for the institution

o) List of governors, their terms of office and the reason why they are members; the name of the Visitor if any

p) Outline details of role and qualifications for management, administrative and support staff

q) Minutes of any student-staff consultative committee (if not included in Management Committee minutes)

r) Business plan

s) Risk register and action plan

t) The TEI's audited annual reports and financial statements

u) A description of accommodation and facilities for teaching, worship, community life and residence, and any development plans.

v) [Where not Common Awards and covered by item 2.k below] Student data as per the analysis sheets overleaf.

2. INFORMATION TO BE PROVIDED BY MINISTRY DIVISION / DURHAM UNIVERSITY

a) Common Awards programme documentation: core regulations, programme specifications, contact hours guidance, module outlines, assessment criteria and guidelines

b) TEI programme regulations

c) TEI module overview table

d) TEI curriculum mapping document if not covered by item 1.b)

e) TEI staff overview document

f) TEI’s annual self-evaluation reports (sections A & B) since previous PER

g) Previous validation visit or PER and follow-up reports

h) External examiner reports and TEI follow-up

i) TEI management Committee minutes

j) TEI Boards of Examiners minutes

k) University Liaison Officer’s reports

l) University Overarching Board of Examiners’ minutes

m) Statistics: student numbers by programme; student outcomes; student progression etc.

n) Summary information on any significant partnership changes since last review

3. ANALYSIS OF STUDENTS: MINISTERIAL TRAINING INSTITUTIONS

AS AT (DATE) ________		
A. STUDENT NUMBERS AND TYPE OF MINISTRY		
A1 Church of England trainees for licensed ministry		
For potential to exercise ministry as an incumbent		
For assistant ministry		
For OLM/local ministry		
For Reader ministry		
please also indicate totals per sponsoring diocese	Total A1	
A2 Methodist Students		
for presbyteral ministry		
for diaconal ministry		
Total A2		
A3 Baptist Students	Total A3	
A4 Students undertaking programmes approved by		
Ordinands sponsored by Bishops from other Anglican Provinces		
Clergy from other Anglican Provinces		
Clergy from other Churches		
Total A4		
	Total A1 to A4	
Total A1 to A4 [Men: Women:]		
A5 Other Students		
From other Anglican Provinces		
From other Churches not listed above		
On in-service courses		
Total A5		
A6 Other (please specify, e.g. independent, youth workers)		
…………………………………..		
…………………………………		
Total A6		
Total A5 to A6		
	Total A5 to A6 [Men: Women:]	
A7 Number of 'lodgers' (not applicable to Courses)		
Total A7		

B. EDUCATION, AGE AND MARITAL STATUS

Students by denomination	Church of England	Methodist Church	Baptist Church	Total
1. Education				
(a) Graduates in theology				
(b) Graduates in other subjects				
(c) Total number of graduates				
(d) Non-graduates with professional qualifications				
(e) Non-graduates with no prof. qual.				
(f) Total of B1 (c) to (e) (=total A1-A4)				
(g) Graduates with additional prof qualifications				
(h) Graduates in other subjects **now** reading theology to degree level				

2. Age	Church of England	Methodist Church	Baptist Church	Other students	Total
(a) Under 25					
(b) Between 25 – 29					
(c) Between 30 – 34					
(d) Between 35 – 39					
(e) Between 40 – 49					
(f) Between 50 – 60					
(g) Over 60					
Total of B2(a) to (g)					

(a) Married ordinands					
(b) Married independent students					
(c) Single ordinands					
(d) Single independent					
Total of B3(a) to (d)					
Married students living in provided accommodation					

Appendix B

Church of England formational framework

The Church of England's learning and formational criteria for ordinands were agreed by the House of Bishops in December 2014. They are arranged under 7 headings and, within each area, look to assess candidates' dispositions, understanding and skills. The formational criteria for ordinands are set out below. A similarly-organised set of criteria for Reader ministry at licensing follows at pages 49-51.

FORMATION CRITERIA for ORDAINED MINISTRY: IME Phase 1

Structure of the formation criteria

The Formation Criteria are organised under seven headings:

A. Christian faith, tradition and life
B. Mission, evangelism and discipleship
C. Spirituality and worship
D. Personality and character
E. Relationships
F. Leadership, collaboration and community
G. Vocation and ministry within the Church of England

Within each of these headings, the Formation Criteria are organised in clusters that are disposition-led [in **bold**] and emphasise the primacy and inseparability of character from understanding and skills:

Dispositions:

These are related to formational learning and character development. They represent the most important criteria: knowledge, understanding and skills are secondary to Christ-like character. However, disposition is not easy to assess: sometimes evidence may be more anecdotal and narrative than systematic. Dispositions are often discerned relationally and developed through a combination of learning, experience, reflection and prayer.

Understanding:

These are related in subject matter to the dispositions, but are not an elaboration of them. They are aspirational in that knowledge and understanding is never complete: ordinands and priests will gain greater depth and breadth of understanding as they continue to pursue and reflect on lifelong learning.

Skills:

Again, related to the first two categories, but not an elaboration of them. While skills and abilities reflect competence, they, too are aspirational: greater fluency will be achieved over time through the experience of exercising ordained ministry in a reflective mode.

Ordained Pioneer Ministry

Formation Criteria for Ordained Pioneer Ministry are described on page 48.

Ordinands who are training for ordained pioneer ministry will do so through pathways that enable candidates to embed their learning in fresh expressions praxis through sustained and systematic action reflection. Although the formation criteria described below will be used to discern whether to recommend pioneer ministry candidates for ordination, progress towards the criteria will have been achieved, therefore, through a distinctive pioneer ministry pathway.

Ordained pioneer ministry candidates will work towards the formation criteria with continual reference to the formation of new ecclesial communities through contextual mission. The mix of skills, gifts, knowledge and expertise that pioneer ministry ordinands bring to their training, formation and ministry, will differentiate them.

Using the formation criteria

The Formation Criteria are fundamentally aspirational: they are goals to work and develop towards rather than criteria that can be 'fully met'. This means that they should be used as a vocational tool:

1. **by ordinands** – to provide a framework for reflection on their development in ministry against the Church's expectations through the training process.

2. **by tutors** – to enable them to discern ordinands' progress in the academic, formational and competency aspects of their development during IME Phase 1, which, in turn forms the basis for reporting to bishops concerning the candidates' readiness for ordination.

3. **by bishops** – as a framework to enable them to confirm candidates' readiness for ordination at the end of IME Phase 1.

A. CHRISTIAN TRADITION, FAITH AND LIFE

Ordinands are disciples of Christ who are growing in new insights through disciplined learning and reflection. They …

- understand the significance of the Bible for the church and the world through critical engagement with Old and New Testament texts and issues relating to their interpretation.

- are able to use their exegetical and hermeneutical skills to interpret and communicate Scripture clearly in a variety of settings.

- understand Christian beliefs and practices: how they have developed in historical and cultural contexts and are interpreted today.

Ordinands are generous in their respect for the breadth and diversity of belief and practice within the Church of England. They …

- understand how Christian beliefs and practices shape the moral life of individuals and communities.

- are able to reflect critically on how Christian doctrine and ethics relate to discipleship, church and society.

B. MISSION, EVANGELISM AND DISCIPLESHIP

Ordinands have an articulate and prayerful enthusiasm for mission and evangelism that is nourished by Christ's love for the world and lived out in acts of mercy, service, justice and reconciliation. They …

- understand holistic and contextual engagement with the world in Christian mission and evangelism from biblical, theological, historical and ecclesial perspectives.
- are able to read the cultural, historical, economic, social, political and religious context of a community, and to develop discernment of God's mission in and beyond the church.
- are able to engage in mission, evangelism and apologetics appropriate to specific contexts both inside and outside the church.
- are able to communicate the gospel sensitively and appropriately using a variety of media, both inside and outside the church.
- enable others in mission and evangelism in a range of contexts.
- understand the beliefs, practices and spirituality of another faith community and the nature of Christian mission in a multi faith context.

Ordinands desire to see others grow in their Christian discipleship and are eager to learn about and teach the faith. They …

- understand how children and adults learn, and the implications for nurturing others in their discipleship and faith development through catechesis, teaching and preaching, including preparation for baptism and confirmation.

C. SPIRITUALITY AND WORSHIP

Ordinands are rooted and growing in disciplined personal and corporate prayer shaped by the expectations of public ministry in the Church of England. They …

- understand different approaches to, and traditions of, personal and corporate prayer in relation to the spiritual development of children and adults.

Ordinands depend on the grace and gifts of God to sustain humble, self-giving service in gathering the people of God in worship. They …

- understand Christian worship and liturgy, their theological foundations and ecclesial and contextual expressions, including pastoral services, especially in relation to the Church of England.
- are able to preach and lead worship competently in a limited variety of settings, using different forms of liturgy and reflecting on their practice.

Ordinands are growing in the love of God and in Christ-likeness as members of the body of Christ through the grace of the Holy Spirit in their lives and ministries. They …

- understand historical and contemporary Christian spirituality grounded in Scripture and tradition.
- are able to relate spiritual traditions to corporate and individual practices that sustain their own prayer life and spirituality, and those of others of all ages and stages of life.

Ordinands have a spirituality that informs their relationship with others and their engagement with the world. They …

- are increasingly able to discern God's presence and activity in the lives of others and in the wider world.

D. PERSONALITY AND CHARACTER

Ordinands are teachable, resilient and psychologically stable in the face of pressure and changing circumstances. They …

- understand personality in relation to human flourishing, relating and team work.
- are able to balance care for others with care for self, including an openness to spiritual direction and support from others.

Ordinands are growing in self-knowledge and commitment to Christ. They …

- understand the sacrificial impact of a vocation to ordained ministry on the whole of life.
- are able to reflect with insight and humility on personal strengths, weaknesses, gifts and vulnerability.

E. RELATIONSHIPS

Ordinands seek to imitate the self-giving love and compassion of Christ in their relationships. They …

- are able to form and sustain healthy relationships inside and outside the church and with those with whom they differ.
- understand issues regarding human flourishing in relationships and Christian pastoral care.
- are able to respond appropriately to pastoral situations and reflect critically on their own practice.

Ordinands are people who respect others, demonstrating empathy and honesty in their relationships, learning from them. They …

- are able to live within the House of Bishops' Guidelines: *Issues in Human Sexuality* and relate empathetically to those with whom they differ.
- understand professional boundaries in ministerial practice and pastoral care.
- understand policies and best practice in safeguarding.

F. LEADERSHIP, COLLABORATION AND COMMUNITY

Ordinands seek to model their servant leadership on the person of Christ. They …

- understand biblically and theologically informed perspectives on discipleship, leadership and community formation especially in the changing and diverse contexts of the Church of England.
- understand issues of authority, responsibility, power and group dynamics in relation to leadership and communities.
- are able to exercise collaborative leadership as part of a team within a community.

Ordinands share leadership by actively looking for and recognising the gifts of others. They …

- are able to release and enable others to fulfill their calling to ministry and mission.

G. VOCATION AND MINISTRY WITHIN THE CHURCH OF ENGLAND

Ordinands believe themselves to be called by God and the church to ordination in the Church of England. They …

- are able to articulate their calling to discipleship and to ordained ministry within the Church of England.
- understand aspects of the history, diversity and contemporary challenges of the Church of England and the Anglican Communion worldwide.
- understand the sacrificial nature and theological underpinning of different ministries in the Church of England and of the ordained ministry to which they are called within the breadth and diversity of a mixed economy of traditional and fresh expressions of church.

Ordinands are rooted in corporate worship in the traditions and practices of the Church of England. They …

- understand the Church of England's role and opportunities for Christian ministry and mission in a range of public settings, agencies and faith communities, including schools.

Ordinands are ready to be accountable and obedient in receiving and exercising ordained ministry as a deacon within the Church of England. They …

- understand the significance of the legal, canonical and administrative responsibilities of the newly ordained within a mixed economy of church.
- are able to apply the methodologies of theological reflection and reflective practice habitually and effectively to themselves and their ministry.

ORDAINED PIONEER MINISTRY

Pioneer ministry ordinands' approach to mission and ministry beyond the existing church is particularly flexible, resourceful, innovative and entrepreneurial. Thriving in unfamiliar cultures and contexts, they …

- understand and are involved in the praxis of planting fresh expressions of church.
- are unafraid to take risks in developing enterprising forms of mission.
- are capable of learning from both failure and success.
- understand and practice the contextualisation of liturgy, sacrament and the ministry of the word, and the role of the ordained minister in this.
- are able to disciple and nurture the faith of adults and children in fresh expressions contexts.
- understand how to develop sustainable, personal and communal support in a fresh expression context within a mixed economy.

A. CHRISTIAN TRADITION, FAITH AND DISCIPLESHIP

Readers are learning and reflecting theologically as disciples and ministers of Christ. They …

- understand issues relating to the interpretation of both Old and New Testament texts in contemporary contexts.
- understand Christian beliefs and practices in their historical and cultural developments.
- are able to interpret and use Scripture effectively in teaching and communicating the gospel in a way that connects Christian faith to everyday life of home, work and society.

Readers are generous in their recognition of and respect for the breadth and diversity of belief and practice within the Church of England. They …

- are learning about how Christian beliefs and practices shape the moral life of individuals and communities.
- are willing and able to reflect critically on hard questions.

B. MISSION, EVANGELISM AND MAKING DISCIPLES

Readers are people whose desire to make God known by word and deed is nourished by Christ's love for the world. They …

- are learning about mission as proclaiming the good news of the kingdom, teaching and baptising new believers, responding to human need, addressing injustice and caring for creation.
- are able to engage in mission, showing sensitivity to different cultures, faiths and environments.
- understand the beliefs and practices of other faith traditions in relation to multicultural society.
- are able to communicate and defend the gospel effectively, especially through preaching and teaching, and both inside and outside the church.

Readers have a deep desire to see others grow in their Christian discipleship, are eager to learn about and teach the faith. They…

- are able to nurture others in their discipleship and faith development through catechesis – including preparation for baptism and confirmation – through enabling learning and communicating the gospel.

C. SPIRITUALITY AND WORSHIP

Readers' dependence on the grace and gifts of God to sustain humble, self-giving love and Christ-like service in the world and church is rooted in established patterns of worship, Bible reading, prayer, study and reflection. They …

- understand the Church's range of approaches to, and traditions of, personal and corporate worship and prayer.

Readers relate prayer and worship to the world of home, work and society. They …

- are enthusiastic about developing their understanding and practice of a range of approaches to Christian spirituality.
- are able to communicate the gospel effectively in a variety of settings.

D. PERSONALITY AND CHARACTER

Readers are a people of integrity, openness and stability, growing in maturity in Christ. They …

- are increasingly free to focus on others.
- are able to value and reflect on their strengths, gifts and vulnerabilities, and identify areas for development.
- are able to nurture themselves while caring for others.

E. RELATIONSHIPS AND COMMUNITY

Readers seek to model the self-giving love and compassion of Christ as a member of his body. They …

- respect others, demonstrating empathy and honesty in their relationships, learning from them.
- are able to interact and communicate well with a diverse range of people both inside and outside the church.
- seek to discern and pray about the needs of their local community and the wider world with a willingness to respond as an ambassador of Christ.
- are able to respond appropriately to pastoral situations and to reflect on their own practice.
- understand policy and best practice in safeguarding

F. COLLABORATION AND SHARED LEADERSHIP

Readers model themselves on the servant leadership of Christ. They …

- understand theological foundations for discipleship, leadership and collaborative working, especially in the context of Reader ministry in the CoE.
- are able to share leadership and work effectively as part of a team.
- are able to facilitate the participation and learning of others for the ministry and mission of the church.

Readers actively look to affirm and foster the gifts of others. They …

- are able to inspire others to fulfil their vocation in the world and the church.

Readers are faithful and loyal in their accountability and responsibility as Readers. They …

- understand how this operates within the framework of ordained and lay ministries in the CoE.

G. VOCATION AND MINISTRY WITHIN THE CHURCH OF ENGLAND

Readers believe themselves to be called by God to licensed lay ministry in the Church of England. They…

- understand the nature of Reader ministry and its characteristics in the context of lay and ordained ministry within the breadth and diversity of the CoE.
- show personal understanding of their gifts for lay ministry as a licensed Reader.
- are learning about the beliefs, traditions and practices of the CoE and how they relate to contemporary issues.

Readers are rooted in corporate worship in the CoE. They …

- are learning about how doctrine and spirituality shape the life of faith and the practices of the CoE.
- understand the CoE's role and opportunities for Christian ministry and mission to the world.

Readers are ready to exercise lay ministry in the CoE. They …

- are learning about accountability within the Church's structure.
- are able to reflect theologically on the ministry and mission of the church in relation to their experience in and of the world.

Appendix C

Competencies for those entering their first appointments in the Methodist Church in Britain as probationers or Ministers of other Conferences and Churches

The Conference of 2016 accepted a revised set criteria for selection for training for ordained ministry around which the competencies are structured. Differentiation between capacity/potential and ability is significant. Where 'ability' is stated, a person should be able to provide evidence that they are already fulfilling this criterion in some way and are willing and able to continue to develop in this area. Where 'capacity' or 'potential' is stated, they should be able to provide evidence that they are ready to enter into public and representative leadership in the Methodist Church in Britain.

1. **Vocation (Call and Commitment)**
    1. An ability to give an account of their vocation to ministry and mission and their readiness to exercise public ministry as a probationer deacon or presbyter in the Methodist Church
    2. An ability to narrate a journey of growth and transformation that is confirmed in the observation of others
    3. A demonstrable willingness to live under discipline
    4. A robust understanding of the significance of public ministry in the church and in the world and of their place in it
    5. A clearly articulated and recognised conviction of a sense of a call to a particular order of ministry which is supported in the opinion of others
    6. The ability to discern which of their previously acquired skills and experience can be incorporated into ordained ministry, which need to be modified and which should be discarded

2. **Vocation (Ministry in the Methodist Church in Britain**)
    1. A demonstrable willingness to live under a shared discipline
    2. A confidence in the Church and the resources to resist the temptation to retreat into a personal or purely local ministry
    3. An ability to articulate and to represent the particular calling of the Methodist people within the body of Christ
    4. An ability to work with and to celebrate diversity within the church

3. **Relationship with God**
    1. A developing spirituality and pattern of prayer consonant with their changing role and growth in learning
    2. A trusting relationship with God that is marked by humility, reverence, awe and wonder
    3. A recognisable reliance on God including regular engagement with the means of grace

4. **Personality and Character**
    1. The ability to exercise appropriate care of self, through developing sustainable patterns of life and work, and effective support networks
    2. A developed self-awareness and self-acceptance grounded in God's loving acceptance
    3. A realistic understanding of the demands of public ministry and an awareness of personal,

ecclesial and social resources on which they depend
4. Self-awareness and strategies to maintain resilience and well-being

5. **Being in Relationship with Others**
    1. An awareness of self and relationship; listening skills and basic pastoral understanding
    2. The ability to form and sustain relationships, including with those who differ, marked by empathy, respect and insight
    3. Demonstrable good practice in a range of pastoral relationships, and the ability to learn from these experiences
    4. An awareness of what it means to live as a public representative minister
    5. An understanding of the power dynamics within pastoral relationships
    6. An ability to operate effectively under supervision
    7. The ability to identify and to maintain appropriate boundaries in professional, pastoral and personal relationships
    8. An awareness of the oversight and support structures within the church

6. **The Church's Ministry in God's World**
    1. An understanding of the mission of God and the ability to interpret it contextually
    2. An ability to read a context in the light of God's call to mission
    3. A specific understanding and experience of Methodism in its breadth and diversity
    4. An understanding of the Church's role in society and its potential to enable transformation
    5. An understanding of the diverse and changing nature of the Church in Britain and of ecumenical possibilities and challenges.
    6. An ability to work within and interpret theologically, the multi-faith context
    7. An ability to evaluate and to work with different expressions of church life

7. Leadership and Collaboration
1. A proven capacity to work with people of different gifts and abilities
2. A developed understanding of the roles and responsibilities of various office holders within the life of the church and the ability to exercise leadership as appropriate
3. A knowledge of different styles and models of leadership and an ability to deploy them effectively within the mission of God
4. The ability to exercise inspiring and creative leadership that empowers and enables others
5. Ability to nurture the gifts of all ages and abilities
6. Commitment to effective administration in circuit ministry
7. An understanding of the nature of oversight and its personal and corporate expression in the Methodist church and its structures

8 Learning and Understanding
1. A proven ability to deploy the methods and resources of theological reflection in the practice of ministry
2. A confident and informed handling of scriptural texts and the traditions of Christian thought as well as critical tools of interpretation
3. A commitment to continued study and learning
4. A proven ability to draw on a range of interdisciplinary resources

5. An ability to recognise her/ his own needs, skills and propensities as a learner and to begin to identify a developmental pathway of study

9 Communication

1. Proven ability to speak faithfully of God in both formal and informal settings
2. A secure understanding of preaching, hermeneutical principles and techniques of communication
3. A developed ability in leading public worship and proclamation, showing understanding of and good practice in liturgy and worship
4. An ability to preach and to lead worship appropriate to a number of styles and contexts
5. The ability to make positive use of feedback and assessment
6. Good communication skills for mission and evangelism
7. A good understanding of and the ability to use a wide range of modern communication media
8. Familiarity with and conformity to the Church's guidelines on the use of social media
9. A clear ability to communicate in written form

Appendix D

Baptist Union of Great Britain: core ministerial competencies

The following framework of core competencies reflects those qualities and skills the Baptist Church wishes to see developed in the ministerial candidates trained by its institutions:

- The ability to study, understand and communicate the beliefs, practices, story and Scriptures of the Christian faith, within and beyond the congregation, and to live a life of Christian discipleship and witness consistent with that understanding.
- The ability to understand Baptist history, principles and practices, and to encourage the church to live in accordance with the core values of the Baptist Union of Great Britain.
- The ability to communicate clearly in public and private settings, within and beyond the congregation, including small groups, written material and preaching
- The ability to offer servant leadership of the congregation/mission initiative in such a way that the ministry of the whole church/organisation is developed, establishing good relationships with others both within the church/organisation and beyond, especially in the areas of conflict resolution and the management of change and emphasising the need for good team working skills
- The ability to offer high levels of informed and compassionate pastoral care and support to individuals, within and beyond the congregation/organisation, and in particular to know the limits of what might be achieved and when to refer to others.
- The ability to lead a church or organisation in its mission, both participating in that mission personally, and enabling others to do so, with the particular ability to advocate for the Christian faith and lead people to Christ.[1]
- The ability to develop and maintain a spirituality that will sustain a life-long ministry, together with an ability to continue to develop personal growth and life-long learning
- The ability to manage self, workload and the strengthening of significant other relationships, within and beyond the congregation/organisation, in order to maintain a balance of ministry and life.

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[1] This includes

- The ability to keep appraised of cultural developments, to reflect theologically on these and to develop appropriate missional responses.
- The ability to read and exegete local communities, neighbourhoods and networks and to discern relevant forms of missional engagement and partnership opportunities.
- The ability to recognise any gap between the congregation/organisation and the wider culture and where appropriate to take action to close this gap. Some ‘gaps’ may be commensurate with gospel values, and should be maintained.
- The ability to recognise fresh opportunities for the congregation/organisation to engage in missional activities, including the planting of new congregations.

- The ability to lead others in public worship, to administer the sacraments and to offer apt liturgical resources to others beyond the congregation/organisation.
- The ability to effectively use basic IT resources and media.
- The ability to welcome, affirm and include others in the life of the church in order to lead a just and inclusive church, in particular to promote racial and gender-justice and care for creation.
- The ability to manage child-protection and vulnerable-adult policies, establishing good practice in these areas, and promoting policies that counter domestic violence.
- The ability to exercise ministry and engage in mission in a secular, multi-faith and multi-cultural environment and to understand ministry in an ecumenical environment.

Paul Goodliff, on behalf of the College Principals.

January 2012