

# Periodic External Review guidance 2020-21

In each section reviewers are asked to include affirming and constructive commentary on the TEI's strengths and identification of areas for development, as appropriate. Reports should include both Commendations and Recommendations for development or enhancement.

## Section A: Formational aims

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

Reviewers will look for evidence of the following.

- i. The TEI's formational aims are stated in its prospectus, policy documents and public-facing on-line material
- ii. They are in line with the TEI's governing documents and statements of purpose
- iii. They are communicated to staff, students, trustees and wider stakeholders

[ *Illustrative evidence: TEI handbook and prospectus, website, trust deed/governing documents, interviews with staff & students; stakeholders' views* ]

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

There is evidence that:

- i. The aims are consistent with the sponsoring church's current and developing expectations and policy statements [*Evidence: PER mapping document 1b), sponsoring church's formation criteria for lay and ordained ministries*]
- ii. They are appropriate to the specific ministries trained for: ordained, lay and pioneer
- iii. They are built into a regular review process, are reshaped periodically as appropriate, and reflect new church thinking, e.g. (for the Church of England) around ministers who are missional, collaborative, flexible, adaptive and diverse
- iv. [For the CofE] The TEI engages with church thinking about diversity and wider access to training, including for those of non-traditional educational backgrounds, and enabling life-long learning.

[*Illustrative evidence: ASE A4, PER overview document 1a), formation criteria, interviews with staff, governors and students*]

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

There is evidence that:

- i. The TEI is aware of and responsive to its public profile and seeks to inform it positively [*Evidence: publicity material and events, PER summary document 1a)*]
- ii. The activity, achievements and character of the TEI are valued by external stakeholders [*Evidence: stakeholders' commentary, church leaders e.g. regional/sponsoring bishops, DDOs, views of current and former students, ASE A10, receiving incumbents/ministers-in-charge*]
- iii. The TEI actively seeks to encourage applications from a range of potential students including BAME enquirers, from women where they are under-represented in the TEI's student body, and from people of diverse backgrounds [*Evidence as above*]

## Section B: Formational context

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

Reviewers will look for evidence of the following:

- i. The TEI draws as appropriate on links with universities and with its Regional Training Partnership to share learning, resources & good practice
- ii. The TEI relates effectively with churches, including in the provision of a range of placement and learning opportunities which reflect a range of traditions and include ecumenical partners.
- iii. There are partnerships / relationships with other faith communities
- iv. There are effective partnerships with civic and community organisations and e.g. hospital, prison and workplace chaplaincies, and systems for learning from them

*[Illustrative evidence: PER overview document 1a), stakeholder responses, interviews with staff, students and placement supervisors]*

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

There is evidence that:

- i. There are appropriate policies for the community in relation to welfare and pastoral care, equality (including gender, ethnicity and disability) and conduct, and these are applied
- ii. Ministerial and teaching staff reflect a diverse age and ethnicity profile, include an appropriate lay/ordained and gender balance and experience in the practice of local church / sector ministry, and comply with denominational guidelines
- iii. Safeguarding procedures, training and practice are in place and in line with national requirements. The TEI is actively committed to a safer church. *[Evidence: ASE A9, national guidance and discussion of handling specific issues]*
- iv. Community is built effectively in both residential and dispersed modes and for people on different ministerial tracks and independent learners. There is an underpinning sense of community life and mutual support *[Evidence: PER summary document 1a), ASE A5a, observation of gathered times including corporate worship, use of on-line learning]*
- v. The student voice is heard in the TEI community e.g. through representation on its committees or similar, with appropriate systems for feedback and action.
- vi. Spouses/families are catered for within the community, as are single students. Their interests and concerns are appropriately recognised within the TEI's decision-making processes and provided for in terms of facilities, accommodation and social timetable

*[Illustrative evidence: TEI handbook, prospectus & policies, interviews of staff, students & families]*

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

As appropriate to the TEI, residential or non-residential, there is evidence that:

- i. Social and private accommodation is fit for purpose
- ii. There is adequate provision for the needs of users with mobility or other disabilities
- iii. Chapel and other spaces for worship are adequate and function well and are capable of imaginative and creative use
- iv. There are ongoing maintenance, plans for accommodation development and its funding, and periodic review of opportunities to secure alternative spaces

v. Upkeep and development plans relate to the church's aspiration to carbon neutrality by 2030.

[Evidence: PER documents 1a) and 1t), TEI business plan and discussion with staff including bursar/finance manager, interviews with other staff and students]

[Illustrative evidence: observation of space in use, discussions, TEI accessibility policy, ASE A11b]

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

There is evidence that:

- i. Corporate worship is built into the TEI's life so far as the pattern of residence, gathered time and contextual training allows.
- ii. Rites appropriate to the traditions and usages of the sponsoring church, and to the make up of the student body, are included. For the Church of England, include comment on the use of BCP eucharist and morning/evening prayer
- iii. The worshipping community is intentionally inclusive in terms of gender, tradition and differing recognised theological convictions [Evidence: worship policy and practice e.g. for Eucharistic celebrants]

[Illustrative evidence: PER documents 1a, c and e), worship policy and visit observation, interviews with staff and students]

#### **B5. Staff model an appropriate pattern of spirituality, continued learning and reflection on practice.**

Do teaching and ministerial staff model that which they seek to form in others? There is evidence:

- i. Of good interaction between staff and students in learning and social settings and of the integration of the learning community
- ii. That staff continue to develop their professional expertise and capacity by modelling a good pattern of work and wider life, continuing learning, personal spirituality and reflection

[Illustrative evidence: TEI handbook and policies, PER summary document 1a), ASE A5a, visit observation and interviews with staff and students]

### **Section C: Leadership and management**

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

#### **C1. The TEI has clear and effective governance structures.**

What are the TEI's governance strengths? There is evidence that:

- i. Management, administrative and financial structures and roles are clearly stated and understood
- ii. The TEI has appropriate accountability and stakeholder representation within and, where appropriate, outside the institution

[Illustrative evidence: ASE A7a and 7b, governing documents, PER documents 1o) and 1p), clear terms of reference for governance bodies, effective accountability to the sponsoring church e.g. to the diocese and bishop for a Church of England diocesan course.]

## **C2. The TEI has effective team leadership.**

There is evidence that:

- i. The TEI's principal/director and senior team are able to be both directive and collaborative
- ii. The principal and senior team have an effective working relationship with the governing body
- iii. Trustees operate effectively as a governance body [*Evidence from e.g. Council minutes and observation of meeting; effective progression of issues between students-staff-governors – stakeholders, and resultant actions.*]
- iv. Colleagues are clear about the TEI's strategic direction and their role in it
- v. There is a widely owned vision for excellence in the TEI, and a positive motivational climate

[*Illustrative evidence: decision process and patterns, governance structure PER summary document 1a), strategy statement / business plan, visit observation & interviews with staff and stakeholders*]

## **C3. Trustees are appropriately recruited, supported and developed.**

There is evidence that:

- i. Trustees have appropriate skills and experience and engage positively with their roles
- ii. Trustees are offered and make use of appropriate mentoring and development, and are enabled to take an active and supportive interest in the TEI and its learning community.

[*Illustrative evidence: PER document 1o), observation and interviews with trustees and staff*]

## **C4. The TEI has effective business planning, fundraising, risk management and reporting**

There is evidence of the following:

- i. A business and strategic plan that covers resources needed, commercial and financial threats and opportunities and strategies for handling these, and performance management [*Evidence: PER document 1s), ASE A11a and discussion; business plan includes expenditure & income needs, fundraising & strategies for publicity and stakeholder engagement*]
- ii. The plan is owned at staff and governance level, has measurable actions and is followed through [*Evidence: PER documents 1p) i.e. staff and council minutes, observation and discussion.*]
- iii. Effective and appropriate budgeting and management accounts, reviewed by staff and trustees, and timely annual financial reporting e.g. to the Charity Commission or via the diocese. [*Evidence of budget document and process ASE A11d, PER document 1q), discussion with finance manager*]
- iv. Risk document and management processes covering key risks – business, reputational, financial, premises (fire, health & safety, site security), operational e.g. ICT and data back-up, with risks appropriately graded and actions/mitigations and timescale, responsible officers/groups [*Evidence: PER document 1r), ASE A11c and interview/discussion*]

## Section D: Teaching and learning

Where applicable reviewers may draw on Durham or other university validation and QA for assurances about curriculum approval, academic process, staffing, mentoring and development, learning support and facilities, and the involvement of students in quality management. This applies especially to D2-4, but reviewers' observation and interviews will be supplementary evidence.

### **D1. The TEI offers programmes appropriate to the sponsoring church's ministerial training needs.**

There is evidence that

- i. the TEI offers an approved curriculum for learning and formation, and can articulate the aims behind it as they relate to the church's ministerial training requirements [*evidence from T11 returns or similar*]
- ii. the TEI's programmes are world-engaging, have appropriate depth, enable theological learning and relate faith to life.

[*Evidence from programme documentation including module overview table 2e), PER overview document 1a), mapping document 1b), stakeholder views, interviews.*]

### **D2. The TEI's taught programmes are appropriately resourced, developed and quality-assured.**

There is evidence that:

- i. Staff members are appropriately qualified, resourced and developed for their roles and there is sufficient capacity within each area [*Evidence from staff overview and CVs, TEI's development and mentoring opportunities, ASE B14, interviews with staff and students, staff handbooks*]
- ii. Students have access to suitable library and IT resources, teaching facilities and information to support their learning, and the TEI seeks students' feedback and addresses their specific needs (such as those of mature students, part-time students, distance learners, those with disabilities).
- iii. The TEI's processes for curriculum review and development are effective, and students are appropriately involved e.g. via module/course evaluation and feedback.
- iv. Programmes are quality-assured via Ministry Team and Durham (or other university) processes, including annual self-evaluation. [*Evidence from ASE and partner university QA*]

[*Illustrative evidence: staff and student handbooks, print and online resources for students, ASE returns, QA reports, interviews with staff and students, relevant committee minutes*]

### **D3. There is a good mix of teaching and learning styles and assessment methods, and students are engaged.**

There is evidence that:

- i. Varied approaches to teaching and learning are used – these might include seminar/small group and lecture, practical and group work; good use of on-line and blended learning; appropriate supporting material; varied assessments. [*Evidence from university QA and validation, ASE, observation and interview.*]
- ii. Programme design and content, and teaching, learning and assessment methods are inclusive and appropriate to any specific needs of the student body (e.g. mature students returning to education after several years, and students with relatively little prior educational experience).
- iii. Students receive sufficient, timely and constructive feedback on their work, and assessment feedback supports student learning

[*Illustrative evidence: ASE, interviews with staff & students, stakeholder views, observation of teaching and learning.*]

**D4. There is provision for students' progression and development over the course of the learning programmes.**

There is evidence that:

- i. The module portfolio allows students to meet their learning outcomes while providing sufficient breadth and also ensuring that students can specialise and study some topics in greater depth
- ii. The curriculum design and the changes in the balance of teaching and learning over the duration of the programme enable students progressively to develop their study skills, critical thinking, and research skills

*[Illustrative evidence: TEI programme documents, stakeholder views, interviews with staff & students, sample student work with feedback, observation.]*

**D5. Students are helped to integrate their academic learning and ministerial development.**

Reviewers will look at provision for students' integration of learning into their ministerial development.

There is evidence that:

- i. Students are helped through the TEI's structures for learning - courses, seminars, tutorials, groups, placements, private study, marking, feedback – to relate theory and practice and to develop skills in their integration
- ii. Students are helped to become reflective practitioners including via training in and use of theological reflection, portfolios and journaling
- iii. Placements are used as a tool for practical learning, reflection and development, and there are good processes for the oversight, assessment and review of placements

*[Illustrative evidence: ASE B12, handbooks for students and/or placement supervisors, student learning agreements (or similar), assessed work and reflections, stakeholder views, interviews with staff and students]*

## **Section E: Ministerial formation**

**E1. The TEI's programme of ministerial formation enables students to grow into the ministerial qualities and competencies sought by the sponsoring church.**

Reviewers will look for evidence that students:

- i. Are enabled to develop in ways consistent with the church's desire for ministers who are relational, missional, collaborative, diverse and adaptive *[Evidence from formational programme, ASE, stakeholder views and interviews.]*
- ii. Are growing in their learning and knowledge of Christian tradition, faith and life *[Evidence from programme content; evidence of students' critical engagement.]*
- iii. Show generous respect for the breadth and diversity of belief and practice within the sponsoring church denomination
- iv. Are developing the habit and skills of theological reflection and reflective practice

*[Illustrative evidence: PER summary document 1a), PER mapping document b), ASE 5d, interviews with students and staff, stakeholders evidence e.g. DDOs, receiving incumbents/ministers-in-charge, process for interim and pre-licensing reports on students.]*

## **E2. Students have a desire and growing ability to share in mission, evangelism and discipleship.**

There is evidence that students:

- i. Are prepared for a ministry that will be world facing in terms of contributing to the common good [*Evidence: PER summary document a), interviews, stakeholders' evidence*]
- ii. Have an articulate and prayerful enthusiasm for and experience of the practice of mission and evangelism, and are eager to teach and learn about the faith [*Evidence of ability to communicate the gospel sensitively and appropriately in and outside church contexts*]
- iii. Have a desire and ability to see and help others grow as Christians
- iv. Are willing and able to nurture the diverse vocations of others to Christian life and ministry

[*Illustrative evidence: PER summary document a), interviews with students, local church supervisors' reports, outreach opportunities, experience of enabling others to grow in Christian discipleship*]

## **E3. Pioneer ministry training [if applicable]**

There is evidence that pioneer ministry students:

- i. Have a growing aptitude and skills for ministry and mission in unfamiliar contexts
- ii. Are flexible, resourceful, innovative and entrepreneurial in their approach to mission and ministry

[*Evidence that students thrive in unfamiliar cultures and contexts, can take risks and learn from both failure and success, and can nurture the faith of adults and children in fresh expressions contexts.*]

## **E4. Students are growing in personal spirituality and engagement with public worship.**

There is evidence that students:

- i. Are involved in preparing and leading worship, including public prayer and preaching, and receive appropriate support and feedback [*evidence of ability to preach and lead worship competently in a variety of settings, programme includes voice coaching*]
- ii. Are rooted and growing in disciplined individual prayer and corporate worship shaped by the expectations of public ministry in the sponsoring church denomination
- iii. Are growing in their personal prayer life and spirituality, so as to inform their relationship with others and their engagement with the world

[*Illustrative evidence: PER summary document 1a), PER mapping document 1b), ASE A5c, worship policy and practice, interviews with students and staff, students' reflections and learning plans, patterns of individual and group prayer and reflection e.g. cell groups, spiritual direction.*]

## **E5. Students' personality, character and relationships.**

Students show evidence of:

- i. Being teachable, resilient and stable in the face of pressure and changing circumstances
- ii. Ability to respect and learn from others and to reflect critically and honestly on personal strengths, weaknesses, gifts and vulnerability
- iii. Ability to form and sustain healthy relationships in and outside the church and to balance care for others with care for self
- iv. Ability to understand and work with professional boundaries in ministry and pastoral care [*Evidence: for CofE trainees, readiness to work with appropriate policies e.g. guidelines for*

*professional conduct of clergy; understanding of safeguarding policy and best practice.]*

*[Illustrative evidence: PER summary document 1a), PER mapping document 1b), interviews with students and staff, stakeholders' evidence e.g. DDOs, receiving incumbents/ministers-in-charge]*

**E6. Students are developing in the dispositions and skills of leadership, collaboration and ability to work in community.**

Students show evidence of:

- i. Growth in leadership capacity and in collaborative disposition
- ii. Readiness to share leadership by actively looking for and recognising the gifts of others; ability to release and enable others to fulfil their calling to ministry and mission
- iii. Understanding of issues of authority, responsibility, power and group dynamics

*[Illustrative evidence: PER summary document 1a), PER mapping document 1b), interviews with students & staff, stakeholders' evidence: DDOs, receiving incumbents/ministers-in-charge]*

**E7. Students' sense of calling to ministry within the sponsoring church is growing, realistic and informed.**

There is evidence that students:

- i. Believe themselves to be called by God and the church to ministry within the sponsoring church and can articulate their calling to discipleship and ministry within that church denomination
- ii. Are willing to serve within the breadth and diversity of the sponsoring church's traditions
- iii. Are willing to be obedient and accountable within the frameworks of the sponsoring church in the exercise of their ministry
- iv. Understand the nature, scope and demands of public ministry within the sponsoring church  
*[For Church of England candidates, evidence that students 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.]*

*[Illustrative evidence: interim and pre-licensing report process, interviews with students, staff and other stakeholders]*

**E8. The TEI has sound procedures for the interim and end-of-training assessment of students' knowledge, skills and dispositions, reporting on their achievement and identifying further learning needs for the next stages of training and ministry.**

There is evidence that:

- i. Formational assessment, both ongoing and summative, enables the TEI to provide a clear and evidenced report to the bishop [or equivalent for ecumenical partner churches]
- ii. Students' achievement of ministerial skills is measured effectively against IME1 reporting criteria throughout their training
- iii. IME1 reporting draws on internal (TEI) and external input *[Evidence from TEI staff, placement supervisors and lay members of the placement community]*
- iv. The TEI's procedures enable tracking and development of students' learning goals from selection into IME1 training, and from the end of IME1 into first curacy / ministerial role, including through use of students' personal learning plans or similar

*[Illustrative evidence: policy, discussion with students and staff including the process around pre-licensing reports on students, comments on areas for further development identified in the BAP/selection report or report from TEI, students' personal learning plans or similar and resultant actions, and their link into curacy/IME2 training]*