Ministry Development Team

Quality Assurance and Enhancement in Ministerial Formation

A guide for reviewers and TEIs

January 2024

Published 2024 by the Ministry Development Team of the Archbishops' Council

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Contents

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 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 the national Ministry Development Team (MDT) 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 MDT will be happy to respond to readers' queries or suggestions for clarification at any time. The staff team can be contacted via the details on page 2.

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 Methodist Church partners with the Church of England in its approach to QA. The sponsoring church denominations' expectations of their ministers are set out at Appendices B-C of this handbook; and those are the standards that underpin QA for TEIs of each denomination. The Church of England's formation qualities frameworks for ordained and licensed lay ministries (Appendix B) were created via church-wide consultation during 2020-21.

The development of quality assurance

2.6 **QA has expanded** 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 In 2014-15 the then Ministry Division (now the Ministry Development Team) applied QA to diocesan schemes training exclusively for LLM/Reader ministry, so that they too are subject to ASE and PER. Although national church funding was not at that stage 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 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 to develop its own more context-specific quality assurance; while the Baptist church now works with the Church of England on QA only in the case of shared academic programme delivery at 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) is a requirement for training institutions. 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. Curacy training (IME2) programmes also undertake a form of ASE, but PER does not apply to this stage of training.

2.10 **Curriculum approval**: The church formerly ran a curriculum approval process separately from PER, whereby institutions were asked to respond to a detailed questionnaire, for review by a panel. Curriculum approval is now 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. Since 2013-14 these have been taught by most TEIs, with negotiated exceptions. Now that Durham University is the academic partner for most TEIs (whereas TEIs previously worked with a 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 Development Team's requirements under this heading, both in terms of ASE and PER.

2.13 In addition, TEIs recruiting international staff or students are currently subject to external review by the HE sector's Quality Assurance Agency.

Governance of quality assurance work

2.14 Quality assurance work is managed by the Church of England's Ministry Development Team 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 as at January 2024 are:

- Rt Revd Sarah Bullock (chair)
- Ms Alyson Bird (Durham Common Awards administrative lead)
- Revd Dr Jonathan Dean (Methodist Church representative)
- Revd Dr Sean Doherty (TEI representative)
- Prof Mike Higton (Durham Common Awards academic lead)
- Revd Dr Ivan Khovacs
- Revd Dr Sarah Lawrence
- Mrs Christine McMullen
- Very Revd Dr Peter Robinson

2.16 Keith Beech-Gruneberg as head of formation leads the Ministry Development Team on quality assurance alongside David Hanson, quality assurance officer.

3 Annual self-evaluation (ASE) for IME1

3.1 Annual Self Evaluation (ASE) by TEIs is a formal requirement as part of quality assurance for Initial Ministerial Education (IME1). 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 the Ministry Development Team (and equivalent bodies in the partner churches where appropriate) and the Common Awards team at 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 National Ministry Team by **30 November** following, and the NMT 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 and Formation Panel reviews a summary of all ASE returns, and issues arising from individual TEIs' returns are explored at follow-up meetings between representatives of that TEI and the Common Awards and Ministry Development teams.

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. We suggest that Quality advisers might normally be expected to serve for a period of three years, but that term can easily be extended if it suits the TEI and the adviser to do so.

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:

- an annual away-day
- a dedicated meeting of the Management Committee
- 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 at https://www.churchofengland.org/resources/diocesan-resources/ministry/training-institutions.

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 the 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.

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).

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/path-way 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 Development Team (MDT)
- MDT forwards Section B of ASE (if relating to Common Awards programmes) to Durham quality assurance office
- Document plus any Durham/MDT response (through staff dialogue with TEI) 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

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 so 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 NMT, 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), available at https://www.churchofengland.org/resources/diocesan-resources/ministry/after-ordination#na under 'Formation and assessment at curacy'; there is no reporting link to Durham's Common Awards Office; and there is no direct feed into Periodic External Review.

3.28 ASE returns for IME2 are formally required as part of any diocese's request for additional funding for curacies from the national church's Strategic Ministry Fund, and they are in any case encouraged as good practice.

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		
6 months to 1 year ahead of PER	• Scene-setting and planning meeting between Ministry Development Team (MDT) 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. The reviewers' visit may be onsite, online or a mix of both. • MDT selects a senior reviewer and other review team members, liaising with Durham colleagues. • MDT 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	• MDT 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 MDT staff to liaise with TEI and reviewers over practicalities for the PER – timings, accommodation, travel etc. • TEI to arrange accommodation, meals and private meeting room for the reviewers during their visit (if onsite), and the necessary practicalities for online attendance where applicable. • TEI provides stakeholder contact details; MDT consults those stakeholders for views.	*5.31; 5.27* *5.31* *5.25* *5.25* *5.14*

6-8 weeks before the PER visit	• TEI provides PER documentation online (some to be supplied by MDT and Durham) for review team members and MDT. 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: team meets, supported by MDT, for refresher training and to plan the PER visit, allocating tasks and report drafting amongst members. • MDT 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 visit (onsite or online) by reviewers in the period scheduled. (A single-day visit by Common Awards team members carrying out academic QA may take place at around the same time.) • MDT staff to ensure space during visit for interim debriefs and communication of issues/questions to the team of reviewers. • MDT 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	• Assessment meeting: review team meets MDT staff facilitator to assess findings against each criterion and the supporting evidence, and plan report drafting. • MDT sends TEI a short summary, agreed by the PER team, of outline findings, within 1 week of the end of the team's visit.	*5.23; 6.1* *5.25; 6.2*
3 weeks after the PER	• Team members draft and e-mail their material to the Senior Reviewer within the first two weeks. • The Senior Reviewer collates, edits and produces a composite draft in week 3, including Durham material, and sends to MDT.	*6.2-6.4* *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 comment within 2 weeks of receipt.	*6.6*
2-3 months after the PER visit	• After further input and revision, informal resolution of disputed issues if required, and a 30-day period of leave for the TEI to appeal the final document if wished, the report is published 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. • MDT and Senior Reviewer review the action plan to ensure it meets the team's concerns. *Only in the case of an overall No Confidence judgement:* • TEI then to produce further quarterly progress reports as needed	*6.17* *6.17* *6.22*
1 year after the PER	• TEI makes a brief written report of its progress. *In the case of an overall Confidence judgement:* • Approval by the Senior Reviewer and MDT to TEI's written report is all that is normally needed. 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 write a 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 the national Ministry Development Team's quality assurance web pages.

Periodic External Review in brief

5.2 Review team members are drawn from a pool of reviewers nominated mainly by diocesan bishops, and in some cases by TEIs. Reviewers are provided additionally by Durham University where a Common Awards QA review is taking place at the time as PER. The team is led by a Senior Reviewer.

5.3 They are briefed on their task by MDT staff, with input from the Durham Common Awards team where needed. Reviewers receive documentation from the TEI, with some also supplied by MDT and Durham (Appendix A). The format of the reviewers' visit to the TEI will vary depending on the complexity of the TEI and may need to take place across different locations and times. A single-site PER visit should broadly equate to a 48-hour period, and the aim is to meet students, staff, governors and other stakeholders and to see something of the life of the TEI. These visits may be either onsite or online or a combination of both, but onsite is generally preferred where practicable.

5.4 The reviewers then 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.

5.5 PER criteria are organised into 5 headings and include (at section E) a focus on formational outcomes. The criteria include guidance about the evidence supporting each one. PER reports include **Commendations** of good practice alongside **Recommendations** for action by the TEI.

Aims of Periodic External Review

5.6 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.

5.7 The role of reviewers is:

- to establish whether the relevant churches' educational and training requirements for ministry are being met (Appendices B-C)
- to encourage and help the institution to develop and exercise good policies and practices in regularly evaluating and enhancing its work; and
- to advise the appropriate authority in the sponsoring churches of any matters of general concern arising from a periodic review.
- If Durham University's Common Awards team carries out a QA review of the TEI's delivery of CA programmes at the same time as PER, with shared evidence-gathering, its aim will be to establish whether Durham University's standards for teaching and learning are being met.

5.8 Reviewers should form as full a view of the TEI's life and work as is reasonably possible. 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

5.9 **Planning meeting with the TEI**: the Ministry Development Team will arrange a planning meeting (normally online) with the TEI's principal and colleagues up to a year before the review is due. Members of Durham's Common Awards team may participate as needed, if an academic review is taking place in parallel with PER. (That review, and the evidence gathering behind it, will underpin the PER reviewers' observations on 'teaching and learning' at section D of their report.) The aim is to get an up-to-date picture of the TEI'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.

5.10 The planning 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 PER visit (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, PER criterion D still applies 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 provide support for section D of the PER. 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 criterion D, but will consider the formational experience and governance within each formational centre individually (criteria A-C and E – see Section 7 of this handbook).

- 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 be some adjustment to the required documentation for reviewers, and the visit-planning.

5.11 **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 MDT and, where appropriate, Durham University. MDT (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.

5.12 The team's Senior Reviewer, who leads the review, is appointed by MDT. The team will reflect the types of training and education being offered by the TEI and will also represent a diversity of background, experience and church traditions. Each team will normally include men and women, and both ordained ministers and lay people.

5.13 MDT 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 four MDT-appointed reviewers, or more in the case of TEIs with more than one formational centre, depending on size and complexity.

5.14 Where an academic QA review of Common Awards programmes is being carried out, those reviewers will include an academic lead and administrative lead. They will attend only a single day of bespoke group interviews focusing on the delivery of taught programmes. Durham University's additional requirement for an external subject specialist is often met by one of the MDT-appointed reviewers – who will therefore normally attend the day's interview programme for the Common Awards QA review as well as the PER visit.

Gathering evidence

5.15 **Advance consultation**: the Senior Reviewer will seek views from the chair of the governing body and sponsoring diocesan bishops before meeting stakeholder groups and individuals during the review visit. Alternatively, the views of bishops may be most conveniently sought as part of the written consultation that the MDT carries 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

5.16 Some of these people may also be present during part of the review visit. The aim of advance consultation is to enable the reviewers to gather a broader range of evidence than is sometimes possible in person. 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. MDT will invite the TEI to propose suitable consultees.

5.17 **PER background documents**: Approximately 6-8 weeks before the reviewers' visit, 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 ask for supplementary information if necessary.

5.18 It is normally convenient to provide the documents on-line e.g. via shared drive, DropBox or Moodle, with restricted access; but the TEI should be ready to provide hard copies of material if requested. Each member of the PER team will need access/copies, as will MDT and, where applicable, the Common Awards review team.

Review visit

5.19 The standard approach is that a short visit is made to the TEI by the review team. Elements of this may take place online, but it is likelier to be onsite and residential. A single-site visit should normally last approx. 48 hours and may 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. Separate visits may sometimes be necessary. 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 To achieve the best possible mix of observation and conversations, the Senior Reviewer, TEI and MDT should work together in advance to design the programme for the visit. By the time the full PER documentation is prepared there should be a detailed timetable of events that the reviewers will observe and individuals and groups they will meet.

5.21 The reviewers' visit programme should build in time for reviewers to debrief, identify emerging findings and issues to feed back to the full team, and areas to explore further. There should be space in the visit programme for the reviewers to dialogue with the TEI's principal and senior leadership if clarification is needed on particular issues.

5.22 If Durham's Common Awards team is carrying out a QA review of academic programmes, this should as far as possible be joined up with the PER: the CA team's visit should take place at around the same time as the PER team's, and the TEI's briefing documentation should serve both purposes. The CA team's visit takes place on a single day and is essentially an academic curriculum review day. 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).

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.

5.23 At least one member of the PER team will join the Common Awards team for the above day of interviews. In addition, the PER and Common Awards review teams will liaise over evidence and emerging views, facilitated by MDT staff, to produce as integrated a set of findings as possible. The two review teams will, however, produce separate reports.

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

5.25 There will be a conversation between the Senior Reviewer and the TEI principal to conclude the visit, and a final debrief for the PER team, facilitated by MDT. Based on that debrief, MDT staff will write a short provisional outline of main findings for agreement by the PER team and for the information of the TEI. This should normally go to the TEI principal within 1 week of the end of the review visit.

5.26 The TEI is asked to provide residential accommodation for the reviewers' visit 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 with MDT and the review team. Outside the period of the review visit, reviewers' travel costs are met by the sponsoring church, via MDT in the case of reviews of Church of England training.

Training and support for reviewers

5.27 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.

5.28 From time to time there will be a general **induction day** which new reviewers are asked to attend before conducting a review. It will cover the principles of external review: the educational/policy

background, current issues, and practical guidance. MDT will work with experienced Senior Reviewers and Durham colleagues on induction.

5.29 In addition, each PER is preceded by a **team training and planning day** which MDT 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
- considering any issues from the TEI's documentation, and planning for the review visit
- allocating responsibilities to each reviewer
- agreeing the timetable for the drafting of the report.

5.30 Both training events will normally take place online.

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

5.32 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 where possible.

The role of the Senior Reviewer

5.33 The Senior Reviewer is briefed by MDT well before the review. S/he also visits the TEI in advance (or has a conversation online) to meet the principal and staff in preparation for the review, essentially to build a working relationship and to gain the TEI's sense of current issues and concerns, and areas where the reviewers' focus might be specially helpful. The Senior Reviewer is responsible for liaison between the team and the TEI before and throughout the review visit, and with the staff of MDT and the equivalent bodies in the partner churches. The Senior Reviewer should:

i) ensure contact with 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 5.15, ensure views are sought from 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 allows 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 emerging concerns are discussed with the principal during the review.

5.34 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. MDT staff are available to advise at any time.

5.35 With the support of MDT staff, 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

5.36 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 TEI 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 TEI or others linked to it (e.g. its regional training partnership) for the rest of the 6-year PER cycle.

5.37 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 training 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.

5.38 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 expectations 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.

5.39 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 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 provision of 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.

5.40 Some of the potential for stress around a PER visit lies at the preparatory stages and can be minimised if MDT 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 the review team will need to make some 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.

5.41 No final judgement will be communicated until the PER report appears in writing, preceded by a provisional outline of the main findings approx. 1 week 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.

5.42 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' report, and all personal print material should be destroyed and electronic files deleted once the report is published.

5.43 In the event that a TEI under review finds a reviewer's professional conduct during a PER falls short of the above expectations, it is hoped that issues can be resolved through dialogue with the senior reviewer and MDT staff (para 5.35). The NCIs' service complaints policy, which covers staff and those working on a volunteer basis on NCI business, exists as a more formal recourse. Again, the policy envisages informal mediation as a first step. It is recognised that to be subject to such a complaint may be stressful for the reviewer, and MDT will want to be sure that s/he has appropriate pastoral support in place, perhaps signposting possible sources if helpful.

6 Writing the report and follow up

Reviewers’ code of conduct

6.1 At or shortly after the end of the review visit the PER team will hold an assessment meeting, in person or online, facilitated by MDT, 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 A letter containing a provisional summary of outline findings is prepared by MDT, agreed by the PER team, and goes to the TEI principal within 1 week of the end of the review visit. It will indicate areas of likely commendation and recommendation, but will not normally name outcome judgements ahead of the full report.

6.3 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.

6.4 Where the TEI under review offers Common Awards programmes and a CA quality assurance review has taken place in parallel with PER, the Durham reviewers will prepare their own report on the TEI-university partnership and the delivery of taught programmes for Durham’s internal quality assurance purposes. As that report connects with section D of the PER report, its emerging content will be shared with the PER’s Senior Reviewer to ensure as much consistency as possible between the two reports.

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

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

Task	When / duration	Who
Assessment meeting	At or soon after the end of the PER visit	Full review team plus MDT 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	MDT staff and/or 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
Informal resolution of outstanding issues if required.	**1 week**	MDT, Senior Reviewer, Quality & Formation Panel (QFP) chair.
Final approval by chair of QFP.	**1 week**	QFP chair
Leave-to-appeal stage	**1 month** if not waived	Chair of governing body and principal
Online publication of report	**1 week**	MDT

6.7 The report is drafted by the team under the leadership of the Senior Reviewer. Teams are encouraged to work collaboratively on drafting. MDT staff may assist with editing as requested/directed by the Senior Reviewer. During the review visit, 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. The report can include issues that have not been discussed with the TEI during the review but there should not be major surprises.

6.8 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 MDT. 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 and that of MDT.

6.9 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. Very occasionally at this finalising stage it may be necessary for the QFP chair to mediate between the senior reviewer's and MDT staff's reading of a point of evidence or judgement about drafting. After the TEI's 30-day appeal period has elapsed (or been waived) – see paragraph 6.17 - the report is then published online. Regular e-bulletins by the MDT and others in the national church will alert key stakeholders including bishops and TEI principals to newly-published reports.

Report structure and outcomes

6.10 The report should adopt the MDT's standard structure and presentational format – staff will ensure 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)

6.11 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.

6.12 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.

6.13 PER reports on Church of England training institutions are published online by MDT. Reports on institutions training for ministry in a partner church are published by that church.

6.14 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.

6.15 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.

6.16 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 good 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

6.17 In the first instance we 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 MDT staff, and the TEI. But if an institution wishes to pursue an appeal against the report in its final form, the following steps apply.

a) **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 MDT 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.

b) **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.

c) **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.

d) **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

6.18 On receiving the published report, the TEI's principal and governing body are asked to draw up and send to MDT, within three months, an action plan stating what actions will be taken in response to the recommendations, by whom and to what timescale. MDT staff and the Senior Reviewer will check that the plan is adequate as a response to the recommendations made and, subject to any agreed adjustment, it is then adopted by the TEI as final.

6.19 Except 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 PER team, 1 year after the review. Before the 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.

6.20 The Senior Reviewer writes a brief follow up-report on behalf of the Quality and 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 and published on the website of the sponsoring church.

6.21 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.

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

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

Outcome	Action within three months of PER visit	Further action within one year	Action one year after review	Following years
Confidence	TEI's action plan with response to each recommendation and whose action and by when	None	TEI's progress report for sign-off by Senior Reviewer if satisfactory.	No further follow-up until next periodic review other than TEI's annual self-evaluations returned to MDT (and Durham), partly informed by PER and setting out proposed and implemented actions.
Confidence with qualifications	As for Confidence	None	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.	
No confidence	MDT 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	TEI's quarterly progress reports to Senior Reviewer and MDT Report on progress made against the action plan	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.	

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 criterion. For convenience the criteria and suggested evidence sources 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 statement and communication of its formational aims. *Evidence includes the TEI's policy documents, prospectus and website, and its communication of aims to the staff and student community and trustees.*

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

- Reviewers will look for evidence of the TEI's regular review of its aims in line with church thinking - for example, about the kind of ministers and the TEI sector that the church wants, and about missional and collaborative skills, diversity, growing a younger church, widening access to training and enabling life-long learning. *Evidence from annual self-evaluation returns and the internal nominee and external adviser within the ASE process.*

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

- Reviewers will look for evidence that the TEI seeks to inform its public profile positively, cultivates external stakeholders and is pro-active in its promotional and recruitment activity. *Evidence from stakeholder feedback – bishops, DDOs and IME2 officers.*

Section B: Formational context and community

B1. The TEI works as appropriate with theological educators in the region and with local churches, other faith groups and community organisations to enhance students' formational opportunities.

- Reviewers will consider the TEI's work with others to create a formational context for students' learning and development. They will draw on evidence of effective links with other TEIs, universities, mission partnerships, local churches and other faith groups, civic and community organisations. *Evidence from documentation including ASE, stakeholder views and interviews.*

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

- Reviewers will consider the TEI's community welfare policies and their outworking, including its pastoral care, safeguarding practice, diversity, and provision for spouses/family members. How well does the community interact onsite and online, in gathered and dispersed modes? *Evidence from policies, ASE, interviews and stakeholder feedback*.

B3. The provision of teaching, worshipping, social and private living space is satisfactory.

- Reviewers will consider the suitability of accommodation including provision for the needs of users with disabilities, the adequacy of chapel space, and maintenance and any development plans. *Evidence from observation, staff and student interviews, 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, tradition and accommodation of theological difference; range of worship styles; and inclusion of students in planning and leading worship. Church of England reviews should include comment on the use of BCP rites. *Evidence from worhip policy, stakeholder feedback and observation*.

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

- Reviewers will look for evidence that teaching and ministerial staff model that which they seek to form in others. *Evidence from PER documentation, observation and interviews.*

Section C: Leadership and management

C1. The TEI has clear and effective governance structures.

- Reviewers will look for evidence of clear management, administrative and financial structures with appropriate stakeholder representation and accountability. *Evidence from PER documents*.

C2. The TEI has good collaborative team 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. *Evidence of stakeholder views, interviews and observation*.

C3. Staff and trustees are appropriately recruited, supported and developed.

- Reviewers will seek evidence that staff and trustees have appropriate skills and engage positively with their role, and that development opportunities are offered and taken up. *Validating university QA should provide evidence about staff. Evidence also from PER documents and interviews*.

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

- Reviewers will look for evidence of business and strategic planning in relation to resources and commercial/financial opportunities and threats; and of effective budgeting, management accounts and financial and risk reporting. *Evidence from documents including minutes, and interviews*.

Section D: Teaching and learning

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

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

- Reviewers will look for evidence that the TEI's programmes are world-engaging, have appropriate depth and relate faith to life. *Evidence from programmes, PER scene-setting document and interviews*.

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

- Reviewers will seek evidence that staffing and other resources are adequate for programme delivery and the support of students' learning, that QA procedures operate, and that student feedback contributes to programme development. *Evidence as per headnote plus programme outline, ASE, observation and interview.*

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

- Reviewers will look for varied approaches to teaching and learning including seminar/small group and lecture, practical and group work; effective use of on-line and blended learning; appropriate supporting material; varied assessments; inclusive of diverse learner groups. *Evidence from university QA and validation, ASE, observation and interview*.

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

- Reviewers will look for evidence of programme and module design and content that support students' progressive development of learning skills and critical thinking. *Evidence from programme outlines, stakeholder views and student work with feedback*.

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

- Reviewers will look at provision for students' integration of learning into their development as theologically reflective practitioners; at the use of theological reflection, portfolios and journaling; and at student feedback and tutorial process. *Evidence from programme outlines, assessed work and reflections and interviews*.

Section E: Ministerial formation

E1. The TEI's programme of ministerial formation enables students to grow in their love for God.

- Reviewers will look for evidence that students are helped to grow in a Christian faith that is life-transforming, rooted in scripture, worship and the church's living tradition, and world-engaging. *Evidence from PER documents, interviews, students' reflections, stakeholder feedback, student reporting*.

E2. Students are enabled to grow in their calling to ministry.

- Reviewers will look for evidence that students' sense of calling reflects a growing understanding of ordained/lay distinctives, a commitment to discipleship, service and its public representative nature, and is realistic. *Evidence from PER documents, interviews, reflections, stakeholders' feedback, student reporting*.

E3. Students are equipped to grow in their love for people.

- Reviewers will look for evidence that students are equipped to be empathetic, good listeners, can build enabling relationships, are committed to a safer church and to peace and reconciliation in the world. *Evidence from PER documents, interviews, reflections, stakeholders' feedback, student reporting*.

E4. Students are helped to grow in wisdom.

- Reviewers will look for evidence that students are enabled to reflect on their experience and learning, are developing in gifts of leadership and collaboration, are self-aware and respond well to feedback, and can relate their social context to the *missio Dei* and the five marks of mission. *Evidence from PER documents, interviews, reflections, stakeholders' feedback, student reporting*.

E5. Students are helped to grow in fruitfulness.

- Reviewers will look for evidence that students can engage with difference, communicate faith to diverse audiences, help adults and children to grow in their everyday faith, and plan and lead worship drawing on scripture and theology. *PER documents, interviews, reflections, stakeholders' feedback, student reporting*.

E6. Students are equipped to continue to develop their potential.

- Reviewers will look for evidence that students are open to development, ready to enable the church's mission and evangelism including in new contexts, and can integrate their discipleship and ministry, work and personal life. *Evidence from PER documents, interviews, reflections, stakeholders' feedback, student reporting*.

E7. Students are able to demonstrate trustworthiness.

- Reviewers will look for evidence that students' pattern of life is grounded in prayer, scripture and reflection; and that they can work with the church's fitness-to-practise accountability framework and with the vision and values of the diocese. *Evidence from PER documents, interviews, reflections, stakeholders' feedback, student reporting*.

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

- Reviewers will look for evidence of ongoing and summative formational assessment processes by the TEI in line with IME1 reporting criteria, and allowing for input from students and those who support their learning, including placement and home context supervisors. *Evidence from ASE and interviews with tutors and students.*

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

8.1 Alongside ongoing quality assessment for all established training, the Ministry Development Team is responsible to the Quality and Formation Panel and the Ministry Council for approval to new training proposals.

8.2 In principle, all new provision is welcome. The Panel and Council welcome applications which contribute entrepreneurial vision and fresh thinking. In the light of the new ecology of training envisaged under Resourcing Ministerial Formation, the following guidelines for the approval of training pathways have been drawn up. In essence, the approving bodies 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 MDT 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 via MDT 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 MDT'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 is 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 Applicants are asked to include an account of diocesan/regional support for the proposed new provision, and of how the proposal has been informed by consultation with neighbouring dioceses and TEIs. In addition MDT will circulate or put online a summary of each of the new proposals and will contact diocesan bishops, training institutions and RTPs for their views, based on that summary.

8.6 This will mean a short period of consultation is built in to the consideration of new proposals. The results of the consultation are 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 MDT by the close of September if students are to be admitted to new provision in the following September.

Criteria for evaluating new training provision for ministry

8.8 All of the following applies to new training provision for ordained ministry. In the case of provision for Reader/LLM training, there is less need for an account of institutional governance, and costs are a diocesan matter, as is local support, hence there is no need for MDT to carry out a wider consultation on views. But MDT, the Panel and Council will still want to be assured that the proposal has diocesan backing, adds value, has a sound educational and formational base, and has realistic staffing and expected student numbers.

8.9 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 (normally a minimum of 8-10) to enable a good exchange of views, perspectives and knowledge
- an approach to learning and formation which will instil 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 IME1?
- 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 RMF, 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 determine the outcome.

Appendix A

PER Evidence: documentation

1) to be provided by the TEI

	Evidence source for
This material is required approx. 6-8 weeks before the visit. Not every item is needed in each case. NMT will agree with the TEI the documentation needed for the PER.	
a) A two-part Self-Evaluation Document containing:	
• a c.2-page '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.	**Section D** Teaching and learning
• 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?	**Section A** Formational aims (and other areas)
ii. What partnerships with faith and community organisations are you developing so as to enhance the world facing formational opportunities for students?	**Section B** Formational context and community
iii. What lies at the heart of your vision for the formation of your students for ministry?	**Section A** Formational aims, and **Section E**
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 relational, missional, collaborative, adaptive and diverse.	**Section A** especially **A.ii** on links with sponsoring church expectations and strategy
v. What patterns of life do teaching and ministerial staff model to students in your institution?	**Section B** especially **B.v**; perhaps also **E**, Ministerial formation
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. (The Common Awards T11 with supplementary commentary might serve.)	**Section E** Ministerial formation

c) The institution's prospectus and/or other publicity material.	**Section A** esp **A.i** and **A.iii** on internal comms & stakeholder engagement
d) Staff/student handbooks and any other published guides relating to the institution's corporate life e.g. code of conduct, harassment, equal opportunities.	**Section B**
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.	**Sections B.iv** and **E.iv** on corporate worship and worship-leading
f) Details of teaching, management and support staff.	**Sections C.iii** and **D**
g) Overview of taught programmes	**Section D** Teaching and learning
h) Teaching timetable covering the period of the review visit.	
i) Update on TEI's progress with actions recommended in the previous Common Awards QA report.	*Items i)-n) are required only by Durham's Common Awards team, if carrying out academic QA alongside PER.*
j) Update and reflection (1-2 pages) on significant Durham-related changes since that report e.g. major staffing or partnership changes.	
k) TEI's academic policies: APL, Admissions, Over-length work; Quality assurance of assessment (i.e. marking and moderating/second-marking practices, feedback), placement learning.	
l) Most recent report from QAA visit if applicable	
m) Representative sample of standard APL claims processed by the TEI	
n) Representative sample of concessions produced by the TEI	
o) Sample (3-4 items) of marked students' work with tutors' written feedback	**Sections D** and **E**, Ministerial Formation
p) Sample (3-4 items) of students' written reflections on their learning and formation	**Sections D** and **E**
q) Governance structure and personnel including trustees' terms of office and the reason why they are members	**Section C** Leadership and management especially **C.i** and **C.iii**
r) 2-3x recent board (or similar) and staff minutes, including minutes of any student-staff consultative committee	**Section C** especially **C.ii**
s) 2x recent annual financial statements	**Section C.iv**
t) risk register with action plan	**Section C.iv**

u) business plan

v) outline of accommodation and facilities for teaching, worship, community life and residence; and any development plans

w) student statistics - **see template at p41** - (numbers, age range, gender, ministry track, educational background in theology or other disciplines).

Section C.iv
Section B.iii
Accommodation

Sections B.ii and **D.iii** make up of community and learning group

2) to be provided by Ministry Team and Durham University

a) Previous PER report

b) Annual self-evaluations since the previous PER

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

d) *TEI programme regulations*

e) *TEI module overview table*

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

g) *Previous validation visit report*

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: Common Awards student numbers by programme; student outcomes; student progression etc.*

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

The previous PER report and ASEs, with the scene-setting document at the top of this list, are key sources for each area of the PER.

Items *c)-n)* are likely to be required only for the Common Awards team's academic QA, where relevant.

Other PER evidence sources - views from external stakeholders

To be sought by Ministry Team via a short questionnaire to a sample of:

- recent former students
- home/supervising ministers
- receiving incumbents
- diocesan directors of ministry / ordinands / vocations
- IME2 officers

Ministry Team also to write on reviewers' behalf to sponsoring / regional bishops and to chair of governors.

Some of these stakeholders to be invited to talk to reviewers as part of PER visit.

Views from former students, sponsors and colleagues in ministry can provide a useful perspective on the TEI's aims, community and achievements (**A, B, D** and **E**). Views from diocesan officers and sponsoring bishops may be informative about stakeholder engagement (**A.iii**).

Evidence from PER visit

The reviewers' visit to the TEI may be in person or online or a mix of both, to include a series of conversations and observed events, approx. 2 days in total:

Conversation partners to include (separately):

- A small sample of the above stakeholders, to expand on written feedback
- TEI principal
- Other lead staff (teaching and management)
- Chair and/or other trustees (in place of attendance at governance meeting, although that is also an option)
- TEI's internal quality nominee (QA lead) plus external quality adviser (the 'critical friend' in the ASE process)
- Sample of students on varying ministerial and academic tracks

Observation to include:

- Worship – i.e. sharing in online acts of worship
- On-line learning (content, approach to teaching and learning, student interactivity)
- Other evidence of corporate life? – would normally include mealtimes, social interaction etc. Conversations as above will provide evidence.

Conversations with TEI community members or trustees can provide evidence on all areas of the PER and a separate perspective on what is provided elsewhere.

Reviewers will see only a brief sample of the TEI's activity but this can provide useful pointers about, for example, teaching and learning, or worship leading and participation (**Sections B, D and E**).

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 new formation qualities framework has been agreed for use from autumn 2022 for ordained ministry (2023 for licensed lay ministry, below). There are seven qualities: **Love for God, Call to Ministry, Love for People, Wisdom, Fruitfulness, Potential, Trustworthiness**. These are expressed in each of four domains: **Christ, Church, World, Self**. The qualities are grounded in the Church of England's ordinals and have a strong basis in their predecessor framework, the 2014 formation criteria, with which they share a focus on disposition, knowledge and skills while giving new attention to potential and growth.

The headline versions of the two qualities grids for ordained and LLM ministries, are set out below. These contain the headings to which reports on ordinands and licensed lay ministry students are written. A fuller account of the framework is given under 'New Formation Frameworks' at https://www.churchofengland.org/resources/diocesan-resources/ministry/training-institutions, along with grids showing how the depth of inhabiting each quality might be demonstrated.

FORMATION QUALITIES for ORDAINED MINISTRY: IME Phase 1

A. LOVE FOR GOD

The candidate…

- [*Christ*] Is reliant on God - Father, Son and Holy Spirit - and lives out an infectious, life-transforming faith
- [*Church*] Is rooted in Scripture, the worship of the Church and the living traditions of faith
- [*World*] Whole-heartedly, generously and attractively engages with God's world
- [*Self*] Is prayerful and studies the Bible

B. CALL TO MINISTRY

The candidate…

- [*Christ*] Responds to the call of Christ to be a disciple
- [*Church*] Understands the distinctive nature of ordained priestly ministry
- [*World*] Is committed to being a public and representative person
- [*Self*] Articulates an inner sense of call grounded in priestly service

C. LOVE FOR PEOPLE

The candidate…

- [*Christ*] Welcomes Christ in others, listens, values and respects; cares for those in poverty and marginalised
- [*Church*] Builds relationships which are collaborative and enabling
- [*World*] Shows God's compassion for the world
- [*Self*] Has empathy and is aware of how others receive them

D. WISDOM

The candidate…

- [*Christ*] Is inquisitive, curious and open to new and lifelong learning
- [*Church*] Shows leadership that enables thriving and healthy churches, handles conflict, can lead in mission
- [*World*] Is robust and courageous and prepared to take risks
- [*Self*] Is a mature and integrated person of stability and integrity

E. FRUITFULNESS

The candidate…

- [*Christ*] Embraces the different and enables others to be witnesses and servants
- [*Church*] Shows capacity to exercise sacramental, liturgical and an effective and enabling teaching ministry
- [*World*] Shares faith in Christ and can accompany others in their faith
- [*Self*] Has resilience and stamina

F. POTENTIAL

The candidate has potential to…

- [*Christ*] Grow in faith, open to navigating the future in the company of Christ and guided by the Holy Spirit
- [*Church*] Manage change, and see the big picture
- [*World*] See where God is working in the world and respond with missionary imagination
- [*Self*] Be adaptable and agile

G. TRUSTWORTHINESS

The candidate…

- [*Christ*] Follows Christ in every part of their life
- [*Church*] Leads maturely which promotes safe and harmonious Christian communities
- [*World*] Lives out their life as a representative of God's people
- [*Self*] Has a high degree of self-awareness

The qualities grid for LLM ministry, below, was developed during 2021 in consultation with a wide group of those who share in formation for and the exercise of lay ministries in the church. It draws on both its predecessor set of lay ministry formation criteria (2014) and the Central Readers' Council's renewed vision, *Resourcing Sunday to Saturday Faith*. A fuller version including suggested evidence is at https://www.churchofengland.org/resources/diocesan-resources/ministry/training-institutions.

FORMATION CRITERIA for READER / LICENSED LAY MINISTRY: IME Phase 1

A. LOVE FOR GOD

The candidate…

- [*Christ*] Is reliant on God - Father, Son and Holy Spirit - and lives out an infectious, life-transforming, everyday-focused faith
- [*Church*] Is rooted in Scripture, the worship of the Church and the living traditions of faith
- [*World*] Whole-heartedly, generously and attractively engages with God's world
- [*Self*] Is prayerful and studies the Bible

B. CALL TO MINISTRY

The candidate…

- [*Christ*] Responds to the call of Christ to be a disciple
- [*Church*] Understands and is excited by the nature of Reader / LLM (Reader) ministry
- [*World*] Is committed to public ministry rooted in God's world
- [*Self*] Has a sense of call to lay ministry

C. LOVE FOR PEOPLE

The candidate…

- [*Christ*] Welcomes Christ in others and follows Jesus' example in listening, valuing and respecting others
- [*Church*] Builds relationships which are enabling of others in ministry
- [*World*] Seeks to serve their community and enables others to join in mission
- [*Self*] Has empathy and is self-aware

D. WISDOM

The candidate…

- [*Christ*] Is open to life-long learning, reflection and growth
- [*Church*] Can work collaboratively and embrace difference
- [*World*] Can connect gathered worship with being sent out into the world
- [*Self*] Is a person of integrity and emotional stability, open to feedback

E. FRUITFULNESS

The candidate…

- [*Christ*] Shares God's story in a way that encourages others to follow Jesus' call in their lives
- [*Church*] Can share the faith imaginatively, relevantly and well
- [*World*] Shares God's love for the world in mission
- [*Self*] Recognises their strengths and weaknesses, and resources themselves with good self-care

F. POTENTIAL

The candidate has potential to…

- [*Christ*] Grow in faith, and to be open to navigating the future in the company of Christ
- [*Church*] Lead collaboratively as part of a local team within the wider church context
- [*World*] See where God is working in the world and spot opportunities to respond
- [*Self*] Be adaptable, imaginative and creative

G. TRUSTWORTHINESS

The candidate…

- [*Christ*] Follows Christ in every part of their life
- [*Church*] Leads maturely which promotes safe and harmonious Christian communities
- [*World*] Leads a life that publicly and positively represents their faith and the church
- [*Self*] Has a high degree of self-awareness

Appendix C

Competencies for those entering 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