

Periodic External Review guidance 2024

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

Section A: Formational aims

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

Reviewers will look for evidence of the following:

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

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

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

There is evidence that:

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

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

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

There is evidence that:

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

Section B: Formational context

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

Reviewers will look for evidence of the following:

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

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

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

There is evidence that:

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

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

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

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

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

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

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

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

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

There is evidence that:

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

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

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

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

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

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

Section C: Leadership and management

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

C1. The TEI has clear and effective governance structures.

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

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

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

C2. The TEI has effective team leadership.

There is evidence that:

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

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

C3. Trustees are appropriately recruited, supported and developed.

There is evidence that:

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

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

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

There is evidence of the following:

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

Section D: Teaching and learning

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

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

There is evidence that

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

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

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

There is evidence that:

- i. Staff members are appropriately qualified, resourced and developed for their roles and there is sufficient capacity within each area [*Evidence from staff overview and CVs, TEI's development and mentoring opportunities, ASE B15, interviews with staff and students, staff handbooks*]
- ii. Students have access to suitable library and IT resources, teaching facilities and information to support their learning, and the TEI seeks students' feedback and addresses their specific needs (such as those of mature students, part-time students, distance learners, those with disabilities).
- iii. The TEI's processes for curriculum review and development are effective, and students are appropriately involved e.g. via module/course evaluation and feedback.
- iv. Programmes are quality-assured via Ministry Team and Durham (or other university) processes, including annual self-evaluation. [*Evidence from ASE and partner university QA*]

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

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

There is evidence that:

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

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

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

There is evidence that:

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

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

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

Reviewers will look at provision for students' integration of learning into their ministerial development. There is evidence that:

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

[Illustrative evidence: ASE B13, handbooks for students and/or placement supervisors, student learning agreements (or similar), assessed work and reflections, stakeholder views, interviews with staff and students]

Section E: Ministerial formation

These criteria relate to the Church of England's new ministerial formation qualities from autumn 2022 for ordinands and 2023 for reader trainees. Reviewers are asked to assess how well the TEI enables its students to inhabit these qualities. Some adaptation will be helpful depending on the ministry trained for e.g. priest, deacon, pioneer, LLM/reader: see the qualities and evidence grids available at <https://www.churchofengland.org/resources/diocesan-resources/ministry/training-institutions>.

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

Reviewers are asked how effectively the TEI enables students to grow in their Christian faith. They will look for evidence that students' faith:

- i. is infectious and life-transforming and that their convictions and pattern of life and prayer are shaped by it.
- ii. is rooted in scripture, worship and the living tradition of the church, and that students are growing in theological understanding and engaging with diverse voices.
- iii. is world-engaging and that students can relate scripture to contemporary issues of justice, peace and creation.

[Illustrative evidence: PER summary document 1a), mapping document b), ASE A4 & A5, interviews with students & staff, students' reflections and learning plans, stakeholder evidence e.g. DDOs, receiving incumbents/ministers-in-charge, process for interim and pre-licensing reports on students.]

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

Reviewers are asked how effectively the TEI enables students to inhabit their ministerial calling. There is evidence that students' calling reflects:

- i. their calling to discipleship and service and a growing readiness to disciple others.
- ii. an understanding of the distinctive nature of their ordained or lay ministerial calling.
- iii. their commitment to the public and representative role of ministry and a growing capacity to engage with the diversity of the Church of England and minister in varied settings.
- iv. a realistic acceptance of the costliness of ministry and the need for support.

[Illustrative evidence: PER summary document), PER mapping document b), interviews with students and staff, students' reflections and learning plans, feedback from stakeholders, interim and pre-licensing reports]

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

Reviewers are asked how well the TEI equips its students to welcome Christ in others, to care for all, and to build collaborative and enabling relationships. There is evidence that students are able to:

- i. be empathetic, good listeners and properly boundaried in pastoral relationships, reflecting best safeguarding practice.
- ii. be aware of the impact of racism and other prejudice in the church and be committed to change.
- iii. engage in mission in the world and equip others to do so, and are committed to peace and reconciliation in the world.
- iv. understand self-care and the need for healthy relationships with family and friends.

[Evidence from PER summary document, PER mapping document b, ASE 5, interviews with students and staff, students' reflections and learning plans, stakeholder feedback, interim and pre-licensing report.]

E4. Students are helped to grow in wisdom.

Reviewers are asked how effectively the TEI enables students to grow in openness to lifelong learning and in readiness to lead in ways that help others to thrive. There is evidence that students:

- i. can reflect on their experience and learning and its impact on them, and can enable others to learn.
- ii. are developing in gifts of leadership and collaboration, and in the capacity to take people with them in shaping a vision and strategy for growth.
- iii. can relate their social context to the *missio Dei* and the five marks of mission.
- iv. have integrity and are self-aware, respond well to feedback, and can acknowledge their vulnerabilities.

[Illustrative evidence: PER summary document 1a), PER mapping document 1b), ASE A5, interviews with students and staff, students' reflections and learning plans, stakeholder feedback, interim and pre-licensing reports]

E5. Students are helped to grow in the quality of fruitfulness.

Reviewers are asked how effectively the TEI helps students to engage with difference, exercise an enabling ministry and accompany others in their faith. There is evidence that students can:

- i. engage respectfully with differences of theological view and help both adults and children to grow in faith.
- ii. confidently communicate the faith to diverse audiences, and can plan and lead worship drawing on the resources of scripture and theology.
- iii. speak of their journey of faith and discipleship, reflect on their learning in mission and evangelism, and encourage others in their everyday faith.
- iv. show resilience, time management skills, and a developing rhythm of life with space for rest and recreation.

[Illustrative evidence: PER summary document 1a), PER mapping document 1b), ASE A5, interviews with students and staff, students' reflections and learning plans, stakeholders' evidence e.g. DDOs, receiving incumbents/ministers-in-charge, interim and pre-licensing reports.]

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

Reviewers are asked how well the TEI develops students' capacity to trust in Christ for the future, to be adaptable, to manage change, and to respond God's working in the world. There is evidence that students can:

- i. enter IME2 with trust and openness to further development and new opportunities.
- ii. support traditional and new Christian communities and work with opportunities for change.
- iii. discern the presence and activity of God, and enable the church's mission and evangelism including in new contexts.
- iv. be self-aware and able to integrate their discipleship and ministry, work and personal life.

[Illustrative evidence: PER summary document 1a), PER mapping document 1b), ASE A5, interviews with students & staff, students' reflections and learning plans, stakeholders' evidence: DDOs, receiving incumbents/ministers-in-charge, interim and pre-licensing reports.]

E7. Students are able to demonstrate trustworthiness.

Reviewers are asked how well the TEI helps its students to develop trustworthiness in ministry, and to lead so as to promote safe and harmonious Christian communities. There is evidence that students:

- i. have a well-developed pattern of life grounded in prayer, scripture and reflection.
- ii. can work with the discipline of the church and the vision and values of the diocese.
- iii. have accountability mechanisms in place, can manage relationships with due regard for best safeguarding practice in the care of children and vulnerable adults, respect confidentiality, are wise in their use of social media, and can work with the church's fitness to practise framework.

[Illustrative evidence: PER summary document 1a), PER mapping document 1b), ASE A5, interim and pre-licensing report process, interviews with students, staff and other stakeholders, students' reflections and learning plans.]

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

There is evidence that:

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

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