

# INITIAL MINISTERIAL EDUCATION 4-6 HANDBOOK: CURATES



SCOTTISH EPISCOPAL INSTITUTE  
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## SECTION 1 TRAINING INCUMBENTS

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*In a static culture it is enough to learn skills once and to dedicate a life to practising them.*

*In a culture re-inventing itself every five to seven years this is untenable.*

*To be a leader in the coming decades will mean by definition to be a life-long learner.<sup>1</sup>*

### Introduction

The formation of new clergy in their God-given calling is a crucial task for the future of the Church, requiring discernment and the empowering of the Holy Spirit. The particular task of supervising a newly ordained colleague is rewarding and demanding in equal measure, a privilege and a joy; it can be deeply challenging and also hugely instructive for the supervisor's ministry as well as that of the Curate. This section of the Handbook contains resources to establish responsible, accountable and wise practice in this developmental process.

Selection of training contexts is based upon a Training Incumbent's ability, and a charge's capacity, to offer appropriate training. To assist in the selection of suitable contexts, dioceses have a clear statement of expectations. In summary, training charges should include the following:

A Training Incumbent who demonstrates

- a regular prayer life and faithful commitment to his/her calling
- commitment to and participation in her/his own continuing ministerial development and study
- commitment to reflective practice and collaborative working
- secure sense of self and the ability to give constructive feedback stability in the charge
- strong connections with the diocese and loyalty to the diocesan strategic direction
- willingness to work with the provincial/diocesan expectations of IME 4-6

A congregation that

- offers a variety of missional, liturgical and pastoral experiences
- is itself open to ongoing learning
- is world-facing and innovative
- is not so niche/'successful' that the emergent Curate is unable or unwilling to function in more 'ordinary' charges at the end of her/his curacy.

The expectations of congregations are discussed at length in Section 3. This section addresses the characteristics of a Training Incumbent.

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<sup>1</sup> *Minister – Love Thyself? Sustaining Healthy Ministry* Pastoral Series 83. Grove Books (2000), 12

## Characteristics of a Training Incumbent

A Training Incumbent is above all **a person of prayer**; someone who has a well-established pattern of personal prayer, reflection and reading. Canon Seventeen 'Of clerical studies and manner of life' proscribes that *'Every Bishop, Priest and Deacon is under obligation to say daily, either publicly or privately, unless hindered by sickness or other urgent cause, Morning and Evening Prayer as ordered in the Prayer Book, or in such alternative form as may be authorised in terms of Canon 22'*. The saying of the Daily Office, and the modelling of this discipline, is fundamental. Training Incumbents must not demonstrate the spiritless managerialism described by Kenneth Leech in this trenchant sentence: 'the church is in grave danger when the office becomes something you sit in rather than something you say.'<sup>2</sup>

Training Incumbents must model a **healthy spiritual life** in other ways too, such as making an annual Retreat, attending Quiet Days and seeing a Spiritual Director (and Confessor, if that is their tradition).

The Training Incumbent needs to be **committed to his/her own lifelong learning** by means of ongoing reading and reflection, active ministerial development - the refreshing of skills by attendance at CMD events - and engagement in some form of regular ministerial development review. The Training Incumbent must undertake further training (provided by SEI) to develop her/his expertise as a Training Incumbent.

The Training Incumbent needs to be **settled in her/his charge**, and prepared to make a commitment to stay for the Curate's training period as far as that is humanly possible to guarantee. In other words s/he ought not to be unsettled and anxious to make a change, but rather 'at home' in the charge, concerned for the congregation's well-being and eager to develop its corporate life.

Equally the Training Incumbent needs to be **'at home' in him/herself**, a 'non-anxious presence', content in his/her own skin. This requires a mature degree of self-awareness and understanding of personal strengths and weaknesses in ministry. Such self-differentiation should enable the Training Incumbent to work closely and collaboratively with a colleague, maintaining a healthy professional, spiritual and social relationship while at the same time establishing and respecting clear boundaries.

The Training Incumbent must be **a reflective practitioner**, skilled in making connections between the contingent realities of daily life/ministry and the resources of the faith. Regular supervision time must be set aside for working with the Curate in a theologically rich manner on the issues and experiences s/he is encountering.

The Training Incumbent will be someone who has nurtured and supervised ministries in the congregation and has a **collaborative approach** to vision setting.

The Training Incumbent will have a **clear theological and spiritual stance** and be able to articulate his/her own theological position, but also be willing to work with a colleague of a different stance.

The Training Incumbent will be prepared for a Curate to develop in ways different from her/his own with regard to the deployment of special gifts of ministry, specific delegated responsibilities and preferred styles of worship, mission and pastoral ministry. S/he will value the Curate's experience

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<sup>2</sup> Kenneth Leech *Spirituality and Pastoral Care* Sheldon Press (1986), 128

from previous employment and responsibilities, and will work with him/her in the ongoing discernment of vocation and ministry development.

The Training Incumbent must be **well versed in the narrative** of the Scottish Episcopal Church, supportive of the missional direction of the diocese, and actively engaged at regional and synodical levels. The whole church is enabled in its mission and ministry if it has an understanding about the role that Christian faith is playing in the life of the nation, what God might be doing through the Scottish Episcopal Church at this time, and what this means for each Diocese and Charge. The Church is encouraged and directed when these things are articulated clearly and regularly, particularly by the Bishops. Ultimately, the narrative of the SEC sits within the story of the mission of God in the world, and our lived-out understanding of what Christ is doing in us and through us.

The Training Incumbent must be a **'hinge leader'**, respectful of the traditions, riches and heritage of the SEC, while responding creatively and missionally to the needs of a changing world.

**In particular, the Training Incumbent will:**

- **undertake** regular daily prayer with the Curate.
- **draw up** a working agreement with the Curate and review it regularly.
- **hold** regular staff meetings for administrative purposes, and separate supervision sessions for shared reflection upon pastoral experience.
- **plan** the Curate's training and mobilise the necessary resources, some of which may lie outside the charge.
- **work with** the Curate to ensure s/he meets the stated IME 4-6 learning outcomes.
- **give priority to** the diocesan IME 4-6 programme, ensuring that the Curate attends conferences and meetings with other Curates.
- **complete** all reports required by the diocese and attend meetings for Training Incumbents.
- **ensure** that the Curate has adequate study time

These characteristics are essential. Training Incumbents, however, should not feel they must possess all the *skills* required to supervise a Curate; there will be people in the congregation who supervise others in their professional lives and can offer valuable support. It is good practice for a Vestry to discern and appoint a few (4-6) people from the congregation with training expertise to form a **Lay Support Group** to accompany the Curate throughout IME 4-6; this is one way in which the Vestry can carry out its duty of care for the Curate as detailed in the Working Agreement. As well as having regular scheduled meetings with the Curate, members of this group might offer to supply feedback on preaching and worship leading.

## Training for Training Incumbents

**On accepting an invitation** to become a Training Incumbent the cleric must sign the Training Incumbent Agreement (Appendix 1 iv).

**Before** the Curate arrives, Training Incumbents will be offered training in understanding:

- the purpose of a curacy in the Scottish Episcopal Church in the light of recent changes in training provision and the establishment of SEI
- agreed learning outcomes for IME 4-6 and the process for assessment at the end of a curacy.
- the nature of the Curate's ministry prior to ordination and the gifts and experience that s/he brings to ordained ministry
- the nature of the training the Curate has experienced and expectations of the nature of lifelong learning
- how to work with the final SEI Appraisal Report in identifying specific training goals
- the devising of an appropriate working agreement, including the setting of clear annual training goals.
- engagement with diocesan IME 4-6 training provision.
- writing evidence-based reports.

Training in supervision will also be offered, and will include the following elements:

- understanding the purpose of supervision in the specific context of training a Curate
- good practice in supervision (e.g. the frequency and content of meetings, the priority of supervision meetings, keeping records, reviewing how supervision is working, etc.)
- the skills involved in good supervision (e.g. listening, giving feedback, enabling reflection, giving space for Curates to explore their feelings about and responses to challenging incidents in ministry), and the qualities that enable good supervision (e.g. good self-organisation, self-awareness, being unthreatened by a colleague's abilities, genuine concern for a colleague's well-being, etc.)
- reflective practice
- handling difficulties, poor performance or conflict.

**During the curacy**, Training Incumbents should be offered support and ongoing training, and this should include the following:

- opportunities to meet with the diocesan IME 4-6 Coordinator to reflect on their work as a Training Incumbent and discuss issues and challenges;
- training events on specific areas of the work
- opportunities to meet with other Training Incumbents to reflect on their work in this role and discuss issues and challenges
- opportunities to engage in training alongside their colleagues.

Dioceses should make arrangements for Training Incumbents to be supervised themselves in relation to the supervisory work they are doing with Curates. In addition, Curates should be asked periodically to provide feedback to the Bishop on the training they are receiving, in a way that feels safe.

**Following the curacy**, Training Incumbents will be debriefed by the Bishop using the criteria in Appendix 2.ii as the framework for evaluation.

## Aims of the training

In keeping with the Learning Outcomes detailed in Appendix 3.i, the kind of ministers that we are seeking to develop are those who:

- are able to articulate their calling to ordained ministry and are realistic about its challenges
- are rooted in the traditions and practices of the Scottish Episcopal Church and share in the spiritual life of the communities which they serve
- are able to communicate the Gospel in the context of contemporary society
- have energy, vision and a clear understanding of the mission of the local and wider church of which they are a part
- have sensitivity in leadership and are able to support and enable lay and ordained colleagues in their discipleship and ministry
- are willing to grow in faith, and in relationships, skills and role

The church needs clergy who are equipped to **understand the context in which they operate**. Every ordained minister needs to understand their context at a variety of levels – national, provincial, diocesan and local.

National: an ordained minister needs to be informed about the spiritual needs of Scotland. This will involve learning about and reflecting on the shaping of national identity and priorities, especially as they relate to relationships with the churches.

Provincial: an ordained minister needs to be informed about the current and developing understanding of the role that the Scottish Episcopal Church plays in the life of the nation. This will include those things that the SEC can offer uniquely through its public voice and ministry, but also those things that are offered through ecumenical relationships with the other churches.

Diocesan: an ordained minister will be well informed about, and actively engaged with, the priorities for mission and ministry of the diocese in which they serve. This will include learning about and reflecting upon trends in social and spiritual needs that are seen across the diocese, and how churches are responding to these in partnership with each other and external bodies.

Local: an ordained minister will grow in skills related to understanding local needs and culture. They will be actively involved in shaping the communities in which their churches are set through a diversity of involvement in mission and partnership working. They will actively represent the local to the diocese in order to inform the mission priorities of the whole church.

In training and formation, especially in churches that have a very particular culture or which are resourced from networks outside the SEC, care needs to be taken to ensure that in developing the four dimensions of understanding described above, priority is given to narratives and mission priorities articulated by the College of Bishops, and seen in the outworking of business through the Church's Boards and Councils. The church needs clergy to minister **as its representatives**, not as independent persons doing their own thing. *'Some clergy look to the ordinal as their whole inspiration and sit lightly to the role of the Training Incumbent as it is today. This mirrors what some business psychologists know about 'double' psychological contracts where the worker is more concerned for one aspect of their work rather than the outcomes for the employer.'*<sup>3</sup>

Curates need to be helped to grow beyond the controlling narrative of their initial call into a more rounded understanding of the *church's* needs and expectations. Existing gifts should indeed be used

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<sup>3</sup> Aveyard, I. 'The Trajectory of Vocation from Bishops' Advisory Panel to First Incumbency' Research Report (2011), 9

and celebrated, but new ones should also be fostered and hitherto untried areas of expertise attempted.

The church also needs **clergy to be flexible**, and to have a '*disposition for deployability rather than too limited a sense of exactly what they are called to do, and where*'.<sup>4</sup> Development of a more specific sense of vocation can come later in ministry, with the discernment of a specialism.

## Working agreements

Working agreements are not legally binding documents but are a means of ensuring that Curate and Training Incumbent have discussed, understood and accepted the expectations of the training post. In summary they should include reference to:

- the expectations of the role
- shared habits of prayer
- healthy and sustainable work patterns
- support mechanisms
- the process of supervision
- the Curate's ongoing studies
- opportunities for learning
- beyond the congregation

Healthy and sustainable patterns of prayer, work, study and leisure must be developed from the earliest stages of ministry for all Curates; the Working Agreement helps to set these in place and is thus a requirement from the very beginning of the curacy.

It is vitally important that time is allocated each week for the Curate's further studies; some will be continuing their academic studies through SEI leading to a BA (Hons) in Theology, Ministry and Mission via Common Awards/Durham University. Others will be pursuing awards or auditing courses through different academic providers. Time allotted for such studies should amount to no less than 15% of ministerial time each week, the equivalent in a f/t post of one day per week.

All Curates, whether stipendiary or self-supporting, should have their expenses of work covered by the charge. This should include the cost of attending required diocesan events and training sessions. The Training Incumbent should ensure that the Curate is aware of how out-of-pocket expenses are handled in the charge, and should check periodically that expenses are being submitted and reimbursed properly, and that proper records are being kept.

The Working Agreement should be shaped in draft form in the first instance and then 'test driven' for the first month of the curacy; a final version should be completed by the end of the October following ordination to the diaconate. The Vestry representative's signature is a sign of the charge's agreement to pay the Curate's expenses, and more importantly signifies the commitment of the whole congregation to the pastoral support and ministerial formation of the Curate, including the release of the Curate in order to benefit from the diocesan IME 4-6 programme. A copy should then be sent to the IME 4-6 coordinator, who will forward the agreement to the diocesan Bishop for final agreement. A copy will also be forwarded to the SEI.

A Working Agreement template is to be found in Appendix 3.ii. The Working Agreement contains questions for discussion which will enable the agreement to be formulated. The Working Agreement can be revised at any point but should always be reviewed as part of the annual review process. Whenever a working agreement is revised a copy of it, dated and signed by both parties, should be sent to the diocesan IME 4-6 coordinator, who will forward it to the diocesan Bishop and the SEI. Any changes from the previous Working Agreement should be highlighted.

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<sup>4</sup> *Bishops' Roundtable. What kind of clergy do we need?* Ridley Hall/Westcott House paper (2012), 10

## Supervision

Ministerial supervision is a method of working closely with an individual for whom one has a defined responsibility so that s/he grows in self-awareness, professional competence, theological understanding and Christian commitment - *for the sake of those for whom they have pastoral oversight*.

The Working Agreement should set out a framework for regular supervision sessions – 10 meetings in a calendar year - and an agreed pattern of working within those sessions. Ministerial supervision sessions need to be clearly differentiated from staff meetings (which may include other people and which are not focused on the learning and development of the Curate). It is good if ministerial supervision sessions can take place at a different time and in a different location from staff meetings in order to mark these differences.

Ministerial supervision sessions should be between 60 to 90 minutes in length, in a quiet place and free (as far as possible) from interruption.

The task of the supervisor within these sessions is to create the environment – physical, intellectual and spiritual - that enables the Curate to interrogate his/her experience of ministry in such a way that deepening theological understanding occurs. By the use of a method of reflective practice (see Appendix 4.ii) the Curate learns how to allow his/her experience to question the theological tradition and the tradition to confront his/her experience.

Ministerial supervision sessions should comprise the following:

- **theological reflection** on a significant incident/experience which the Curate brings to the session, or else upon aspects of ministry (including preaching), a book read together, matters of doctrine, conferences or training attended. Actions emerging from this discussion might include further reading, extending ministerial practice, further training or changes to approaches to ministry.
- **general review of the Curate's ministry and development** (how is the curacy progressing against the training plan? are core areas of ministry being covered? are core knowledge and skills being developed? what is the next stage? how is this being planned for? how will it be implemented?)
- **actions/agenda for next meeting** (who will do what before and for the next meeting?)
- **space to discuss any issues or concerns** with respect to the Curate/Training Incumbent relationship; that is, space to ask, 'How are we doing? Is there anything we need to discuss about our working relationship?'.<sup>5</sup>

It is the Curate's responsibility to ensure that a Record of Supervision (Appendix 2.i) is filled in following each meeting, and that at the end of the year it is copied, signed and sent to the Bishop along with the reports from the Curate and Training Incumbent.

At the end of the year (or when requested), the Curate and Training Incumbent sign the document as a fair record before it is sent to the Bishop.

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<sup>5</sup> Rick Simpson *Supervising A Curate: A Short Guide to a Complex Task* Grove Booklets (2011), 20

## Reviews and reports

Curate training must be engaged in seriously and completed satisfactorily to ensure fitness to exercise ministry in a post of responsibility. Throughout the three years, and especially at the end of this period, there must be sufficient evidence to show that Curates are suitably trained and ready to move to a position of greater responsibility. Through a process of review and assessment, outlined below, evidence of growth and development must be amassed.

There should be an annual review between Training Incumbent and Curate using the Annual Review Form (Appendix 2.iii). The purpose of this review will be to reflect on the previous year and to identify specific priorities for the year ahead.

In preparation for the review meeting, the Curate and the Training Incumbent should prepare a report (Appendix 2.iii) comprising:

- a general opening paragraph
- a summary of development mapped against each of the Formational Outcomes (Appendix 3 i); against each criterion the question is asked: *what development has there been in the last year and what development may be looked for in the coming year?*
- a summarising conclusion
- priorities for next year

A meeting of at least an hour and a half should be put into the diary, and the completed forms should be exchanged at least a week before the meeting so that both can have the chance to prepare.

At the meeting the two reports are discussed, and then signed and dated to indicate that – and when they have been shared. The two reports are sent to the Bishop, together with a copy of the Record of Supervision (Appendix 2.i) that has been completed by the Curate and signed by both parties, along with any other information required by the Bishop. After receiving the reports, the Bishop will meet with the Curate to reflect on the year.

The Working Agreement between Training Incumbent and Curate is also reviewed as part of this Annual Review. The Working Agreement can be reviewed at any other time by mutual agreement of the Incumbent and Curate. This may be appropriate following changes in personal circumstances or if it becomes clear that revision is necessary to maintain a professional working relationship. Whenever a working agreement is revised a copy of it, dated and signed by both parties, should be sent to the diocesan IME 4-6 coordinator, who will forward it to the diocesan Bishop and the SEI. Any changes from the previous Working Agreement should be highlighted.

At the Review meeting, Part 2 (Appendix 2.iv) should be filled in detailing priorities and training needs for the year ahead. The list of training needs should then be sent to the IME 4-6 coordinator who will forward it to the Bishop and to the SEI.

Towards the end of the curacy, around May of the third year, the Curate will have his/her final review. At that time it will also be essential to review the success of the curacy as a whole.

## Resolving difficulties

The working relationship between Training Incumbent and Curate can give rise to particular problems, some of which arise from the very complexity of the relationship. For example, both care deeply about their work and quite small difficulties can be magnified. There may be continuous contact, and boundaries between private life and ministry are hard to define and sustain. Accountability is difficult to define. The Curate is accountable to God, to the Training Incumbent and has a duty to the congregation. What happens when there are conflicting claims of loyalty?

Particular friendships with members of the congregation can be a cause of friction between the Training Incumbent and the Curate. There can be people who try to play off the Training Incumbent against the Curate and vice-versa. Loyalty and integrity is fundamental in the Supervisor-Curate relationship.

The ordained ministry is particularly subject to stereotypes and we can very easily collude with projections that other people put on us and on our work. Some newly-ordained Curates find that parish ministry is an anti-climax after the intensity of training.

Whilst one would normally expect a basic alignment between an Incumbent and the Curate – for example with regard to the nature of ministry - differences of age, outlook and style will often provide areas of conflict. This relationship will certainly bring out personal vulnerabilities, not least in the supervisor himself/herself, and he/she should be able to face up to this beforehand. If the relationship is to be one of mutual growth and understanding, there will be a place for ‘constructive conflict’ which may well create intense emotional responses. It is essential to maintain lines of communication so as to be able to talk to one another, with praise and criticism in both directions.

At times of difficulty or tension between Training Incumbent and Curate, it is particularly important to guard the relationship with courtesy, respect and good communication. People working as a team need to be aware of how their own manner or style may irritate or frustrate others – for example, lack of punctuality or failure to meet agreed deadlines. However, there is a danger that courtesy will be considered incompatible with conflict. All relationships involve difference and conflict, and if handled openly and with mutual commitment to a good outcome, these aspects can be life-giving. Even in times of difficulty in the relationship, both Training Incumbent and Curate have a right to loyalty and support from the other.

Sometimes Training Incumbent and Curate may encounter difficulties in the relationship which they themselves are not able to resolve. It may be that an impartial third-party can help to unlock the situation, whether through short-term consultancy or mediation, or longer-term mentoring of the relationship. The diocesan IME 4-6 Coordinator should always be the first port of call in any such situation, and will keep Bishops informed. Where it seems that relational difficulties cannot be resolved, or where allegations of incompetence may be involved, diocesan procedures will be followed. The underlying principle at all times is to seek resolution and/or reconciliation as far as possible without unnecessary and damaging escalation. Details of grievance and capability procedures can be found in Section 3 of the *Personnel Handbook for Stipendiary Clergy* produced on behalf of the Administration Board of the General Synod of the Scottish Episcopal Church November 2004 (with amendments December 2014).

## SECTION 2 CURATES

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### Introduction

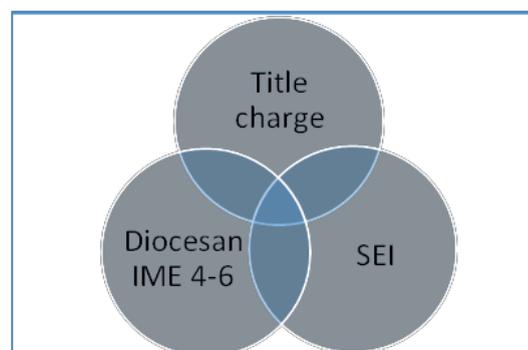
The primary aim of a curacy is to develop clergy who are spiritually alive and able to lead with emotional maturity, manage the challenges of disagreement and conflict, and help others grow in faith and discipleship; clergy who emerge from the IME 4-6 years ready to face the challenges and develop the opportunities of their future ministry as Incumbents, Chaplains, or Assistant Priests. The curacy delivers this by enabling to the Curate to:

- share in the mission and ministry of the People of God in a particular place
- establish patterns of prayer, spirituality, practice and study that will shape and sustain ministry
- acquire the knowledge, skills and expertise in ministerial, representative and sacramental missional leadership in the local church and the Scottish Episcopal Church
- reflect in supervision, shared study and personal exploration in order to develop ministry within the curacy and for the future
- develop their self-understanding through integrating past experience, spirituality, and theology with the practice of ministry

Strictly speaking, Curates are *Assistant* Curates; people who assist in the cure of souls of the people among whom they serve. But it would be a mistake to think of the purpose of the post only in terms of the assistance that Curates give, important as that may be. This post is part of an ongoing journey of learning, formation and development that began many years previously, continued through the years spent at the Scottish Episcopal Institute, and which will be life-long. Entitling the three years of the curacy 'Initial Ministerial Education 4-6' makes that ongoing formational aspect plain; these years are part of a six year trajectory. Curates are indeed appointed to assist with the tasks of ministerial leadership in the charge, but are *also* expected to spend time reflecting upon those experiences, reading more deeply and growing in wisdom and understanding.

Believing that there is value in a structured approach to the formative experience of serving in a Title post, the Scottish Episcopal Church has put in place processes and protocols which are uniform across the Province. This not only helps the Church to understand what is expected of Curates in these first three years of public ministry, but also assures Curates of effective support as they grow into the role of a public minister.

In the Scottish Episcopal Church there are three dimensions to the IME Programme, each of which offer Curates support for their continuing personal formation and ministerial development. These are the Title charge, the Diocesan IME 4-6 programme and personnel, and the Scottish Episcopal Institute.



## Three dimensions of the IME Programme

### (i) The Title charge

The foundation of ordained ministry is gained in the Title charge. Great care is taken to assign Curates to contexts that offer a wide variety of missional, liturgical and pastoral experiences and are open to ongoing learning and innovation, and to experienced Training Incumbents who are faithful priests, good managers of people and excited by the challenges and opportunities of congregational ministry.

The establishment of a good working relationship between Training Incumbent and Curate is vital, helping to set patterns that last a lifetime of ministry. If this relationship is to be successful, it must be based on openness and honesty underpinned by mutual trust, respect and a commitment to greater understanding of one another. The Training Incumbent must encourage the Curate, rejoicing in the new gifts they bring to the charge. In turn, the Curate must value the Training Incumbent's greater experience of congregational ministry, be willing to trust his/her judgement and work within the structures that have been put in place. In short, the Training Incumbent must cherish and cultivate a new ministry whilst the Curate must be guided by, and be able to accept, the leadership of the supervisor.

Most importantly, the relationship needs to be grounded on shared prayer. The very first issue to address when working towards the establishment of the Working Agreement which will underpin each year's work is that of prayer. For stipendiary colleagues, the sharing together of the Daily Office, expected of Anglican clergy, is a vital part of personal formation and an essential ingredient in the development of a wholesome and Christ-centred relationship between Training Incumbent and Curate. In rural contexts, this shared, daily prayer may present a challenge and may have to be done virtually on occasions, but remains a priority.

**Working Agreements**, renewed annually and covering all aspects of the year ahead, are a means of ensuring that Curate and Training Incumbent have discussed, understood and accepted the expectations of the training post. In summary they include reference to:  
the expectations of the role

- shared habits of prayer
- healthy and sustainable work patterns
- support mechanisms
- the process of supervision
- the Curate's ongoing studies
- opportunities for learning beyond the congregation

Curates and Training Incumbents start work on a draft Working Agreement long before the ordination, but do not submit it until a month after the ordination to allow it to be 'test-driven' for a while to see if it fits. It should then be sent to the diocesan IME 4-6 Coordinator who will forward it to the diocesan Bishop and the SEI. A template for the Working Agreement, with questions to aid completion, is to be found in Appendix 3.ii.

Agreement should be reached and detailed on the Working Agreement about how often it is expected the Curate will be present, robed, in a leadership role and preaching - and how feedback from congregation, colleagues and the Training Incumbent will be managed.

There should also be specific agreement about confidentiality and about the role of the Curate to support and be loyal to the leadership of the Incumbent in the charge. It will be useful to agree a process for reviewing this if at any time there seems to be pressure on the agreement reached. In particular there needs to be agreement as to what is confidential to the individual and what needs to be shared between the Curate and the Training Incumbent.

The Working Agreement should also set out a framework for **regular supervision sessions** - 10 per calendar year - and an agreed pattern of working within those sessions. Ministerial supervision sessions need to be clearly differentiated from staff meetings (which may include other people and which are not focussed on the learning and development of the Curate). It is good if ministerial supervision sessions can take place at a different time and in a different location from staff meetings in order to mark these differences.

Ministerial supervision sessions should be between 60 to 90 minutes in length, in a quiet place and free (as far as possible) from interruption. Brief notes showing subjects covered and action points should be made and kept by the Curate and agreed by the Training Incumbent.

Such supervision sessions are a chance to engage in **theological reflection** upon the experience of public ministry. The methods of theological reflection that have been learned and used throughout IME 1-3 – the hermeneutical cycle, Critical Incident Analysis, Case Study method, journalling and so on – should continue to be used throughout IME 4-6 and beyond. The Curate is encouraged to take primary responsibility for bringing issues to supervision e.g. personal encounters, pastoral dilemmas, theological explorations and practical challenges; the list in the box below suggests some avenues for exploration.

- a task performed: a sermon, a visit, a project
- a significant event which has been stretching, disturbing or rewarding.
- a current policy of the church: baptism, admission of children to Communion etc. a topical concern: a particular local need, a problem, crisis or opportunity
- a book read by both Curate and Training Incumbent
- conferences or training attended

Reflective practice starts from the actual experience of ministry, carefully observed and recalled. The observation is then brought into dialogue with a number of different perspectives: *how does this connect with previous experience or assumptions? what light is shed by other learning and knowledge? what biblical passages or theological themes help me to discern where God may be seen in this, or what God may be saying? what questions does this leave me with?* This whole process may generate new insight and learning, but the real 'added value' comes from the question '*what am I going to do differently as a result?*'. Actions emerging from this discussion might include further reading, extending ministerial practice, further training or changes to approaches to ministry.

The agenda of the supervision meeting should be formed by theological reflection on the issues listed above. It is the Curate's responsibility to ensure that a Record of Supervision (Appendix 2.i) is filled in following each meeting, and that at the end of the year is copied, signed and sent to the Bishop along with the reports from the Curate and Training Incumbent.

## (ii) Diocesan IME 4-6 provision

The second dimension of the curacy training provision is offered on a diocesan basis. The aim of this aspect is to complement and enrich all that is being learned in the local context. Every diocese handles this component differently but all will have someone who acts as the Diocesan IME 4-6 Coordinator in some capacity; contact your local Diocesan Office to discover who the current IME 4-6 Coordinator is.

The provision will include regular meetings of all the newly ordained in one or perhaps two dioceses; these meetings will be separate from those for newly licensed Lay Readers. Their purpose is to provide a space for sharing and theological reflection on experience, and to provide Curates with a supportive peer group. It is good practice if some of these meetings enable Curates to spend significant time with the Bishop/Bishops of those in the group.

## (iii) Scottish Episcopal Institute

The third dimension of the curacy provision is offered by SEI. It does this in three ways. Firstly it is responsible for training the Training Incumbents, ensuring that they are fully aware of the expectations of the Church as regards supervision and mentoring, and competent to carry out those responsibilities.

Secondly it offers a BA (Hons) in Theology, Ministry and Mission through Common Awards/Durham University and hopes to offer an MA as well in due course. The BA requires 360 credits, that is, 120 credits on top of the 240 credits awarded at Diploma level, the exit level for IME 1-3 studies. 40 credits will be studied per year. 80 credits will be in modules over two years (delivered on Skype), and 40 more credits will be via a dissertation researched and written over one year. The dissertation topic will be decided on an individual basis, but the modules will be agreed between the members of the cohort.

As well as time allocated for preparation of worship, preaching and teaching, it is necessary that time for such studies as are detailed above is agreed. Study in connection with the SEI programme (or allied academic work) is to be regarded as part and parcel of the obligations of ministry in the charge and not as something in addition to or separate from it. Time allotted for such studies should amount to no less than 15% of ministerial time each week, the equivalent in a full-time post of one day per week. This provision should be agreed and written into the Working Agreement from the outset. Such study must not be seen by either congregation or Curate as 'an added burden'; it cannot be stressed sufficiently that it is an integral part of the formational pathway and part of the ministerial task.

Thirdly it receives the Training Needs *pro forma* (Appendix 2.iv) completed at each Annual Review, reviews these to see if there is commonality of need across Dioceses, and if so, helps to set up appropriate training events.

*These, then, are the three primary dimensions which offer Curates support for their continuing personal formation and ministerial development. A curacy is most likely to be successful if there is open and honest communication between these elements. Each person involved must understand their role in relation to that of the others, and there must be co-operation and a willingness to develop healthy relationships, and a coherent and positive ethos.*

## Spiritual development

In addition to participating in the corporate life and worship of the charge, the Curate will be committed to developing his/her own Christian discipleship and life of prayer. It is expected that s/he will have regular access to a Spiritual Director/Soul Friend, and go on Retreat at least once per year. It is normally not advisable for the Training Incumbent and Curate to have the same Spiritual Director/Soul Friend, and separate retreats are likewise preferable. It is vital that a Rule of Life be discerned, followed and developed. This is not simply for the three years of curacy, but as a lifetime foundation for ordained ministry. The importance of this cannot be overstated.

## Rhythms of life

Healthy and sustainable patterns must be developed from the earliest stage of ministry for both stipendiary and self-supporting Curates. Training Incumbents must be able to model this themselves or else they will be part of the problem. Activism is often linked to a myth of indispensability, with which clergy are often willing to collude.

Training Incumbents have a responsibility to help Curates find a good balance between work and rest; finding the right 'work-life balance' is as much a matter of living a healthy spirituality as it is of having a healthy working pattern. In any day in which morning, afternoon and evening are all worked, it is advisable to take two or three hours out at some point in the day. It is generally unwise to work for more than eight hours consecutively without taking a reasonable break of a couple of hours. It is also vital to have an agreed day off, communicated to the congregation, and for this, whenever possible, to include the previous evening.

All Curates should be aware of *The Guidelines for the Professional Conduct of Clergy*  
<http://www.scotland.anglican.org/vestry-resources/appointments-and-employment/professional-conduct-of-clergy/>

## Expenses and Fees

All working expenses of the Curate should be met by the charge, including telephone, postage and travel. The Training Incumbent should check periodically that expenses are being submitted and reimbursed properly, and that proper records are being kept.

The Training Incumbent has a responsibility for explaining the processes for payment of stipend, other benefits and expenses, and also tax and national insurance issues. The Incumbent should introduce the Curate to the Treasurer of the charge early in the curacy.

Information about matters of a personnel nature or affecting the terms and conditions of office of stipendiary clergy within the Church is contained in the *Personnel Handbook for Stipendiary Clergy* (SEC 2004), but this is in process of being revised and so is currently not on the web site.

## Reviewing and evaluating the curacy

There should be an annual review between Training Incumbent and Curate using the Annual Review Forms (Appendices 2.iii and 2.iv). The purpose of this review will be to reflect on the previous year and to identify specific tasks and learning for the year ahead.

In preparation for the review meeting, the Curate and the Training Incumbent should prepare a report (Appendix 2.iii) comprising:

- a general opening paragraph
- a summary of development mapped against each of the Formational Outcomes (Appendix 3 i); against each criterion the question is asked: *what development has there been in the last year and what development may be looked for in the coming year?*
- a summarising conclusion
- priorities for next year

A meeting of at least an hour and a half should be put into the diary, and the completed forms should be exchanged at least a week before the meeting so that both parties can have the chance to prepare.

At the meeting the two reports are discussed, and then signed and dated to indicate that – and when they have been shared. The two reports are sent to the Bishop, together with a copy of the Record of Supervision (Appendix 2.i) that has been completed by the Curate and signed by both parties, along with any other information required by the Bishop. After receiving the reports, the Bishop will meet with the Curate to reflect on the year.

The Working Agreement between Training Incumbent and Curate is also reviewed as part of this Annual Review. The Working Agreement can be reviewed at any other time by mutual agreement of the Incumbent and Curate. This may be appropriate following changes in personal circumstances or if it becomes clear that revision is necessary to maintain a professional working relationship. Whenever a working agreement is revised a copy of it, dated and signed by both parties, should be sent to the diocesan IME 4-6 coordinator, who will forward it to the diocesan Bishop and the SEI. Any changes from the previous Working Agreement should be highlighted.

At the Review meeting, Part 2 (Appendix 2.iv) should be filled in detailing priorities and training needs for the year ahead. The list of training needs should then be sent to the IME 4-6 coordinator who will forward it to the Bishop and to the SEI.

## Relationships

It is important that from the very beginning, the Curate has a balance of experience and is not expected to concentrate on one area of work to the exclusion of all others. The checklist (Appendix 3.iii) may provide a useful corrective in the case of any such imbalance. At the same time, full recognition should be given to the particular gifts that the Curate will bring to congregational life. By the end of three years, there should have been at least one project for which the Curate has been responsible for leading from planning stage to review.

Although final authority in the charge rests with the Incumbent there is a degree to which authority is shared with the Curate. The extent of this delegation needs to be made clear with regard to any given task. It is important that both Training Incumbent and Curate are clear about how information is shared in both written and spoken form, both between the two of them – noting that talking and praying things through together is preferable to e-mailing, particularly when there is disagreement in the air - and between them and the congregation, so that this area of practice does not lead to misunderstanding and communication breakdown.

The Training Incumbent-Curate relationship is a complex one: it is both personal and professional, with power balanced heavily towards the Training Incumbent as manager and supervisor. Mutual friendship may well develop between two colleagues, but this must not be assumed, nor is it actually essential to a good working relationship, in the ways that trust and respect are. Difficulties can arise

when the professional relationship is used to fulfil social needs of either party, and the expectation of friendship can be oppressive and inappropriate.

Where the Curate has other family members living with them, these relationships add to the potential complexity of being 'in role'. Clergy family members – including any children - should be protected from the unrealistic expectations and projections of congregations. Moreover it must be stressed that neither the Incumbent's nor the Curate's family is part of the supervision relationship between Training Incumbent and Curate. It is important that confidentiality and boundaries are clearly maintained.

Members of a Curate's family should be free from any expectation of role, but be welcomed and encouraged into the life of the congregation at whatever level they feel comfortable. For various reasons, family members may choose not to attend church with the Curate, if at all; they do not have to account for their choice to either Training Incumbent or congregation. Curates living alone should not be subject to any greater or different expectations (e.g. of availability in the parish) than those with family responsibilities.

## Difficulties in relationship

Curacy is a time of huge change; along with the joys, it is not uncommon to experience new pressures or unforeseen difficulties. Ideally the relationship established with the Training Incumbent should be such as to allow these to be spoken about honestly, openly and before any escalation of distress. Curates should feel able to bring such issues to supervision sessions without feeling that their identification and expression will lead to 'a black mark on their record'.

The Training Incumbent-Curate relationship is likely to encounter difficulty at times, as do all relationships involving difference. If handled openly and with mutual commitment to a good outcome, these stress points can in fact be life-giving. Sometimes, however, Training Incumbent and Curate may encounter difficulties in the relationship which they themselves are unable to resolve. It may be that an impartial third-party can help to unlock the situation, whether through short-term consultancy or mediation, or longer-term mentoring of the relationship. The person who holds the IME 4-6 portfolio in the diocese should always be the first port of call in any such situation, and will keep any information shared with her/him confidential. Where it seems that relational difficulties cannot be resolved, or where allegations of incompetence may be involved, diocesan procedures will be followed. The underlying principle at all times is to seek resolution and/or reconciliation as far as possible without unnecessary and damaging escalation. Details of grievance procedures can be found in Canon 53.10 of the Code of Canons and Appendix 29 to the Code.

At times of difficulty or tension between the Training Incumbent and the Curate, it is particularly important to guard the relationship with courtesy, respect and good communication. People working as a team need to be aware of how their own manner or style may irritate or frustrate others; for example, lack of punctuality or failure to meet agreed deadlines. Even in times of difficulty in the relationship, both Training Incumbent and Curate have a right to loyalty and support from the other. Difficulties may arise within the wider staff team. The arrival of any new member of the ministerial team will change the balance of an existing team, and some may have ambivalent feelings about a newcomer and how their own role may be affected. It is important that open, honest conversations are enabled by the Training Incumbent between all members of the team, separately and together.

## Mutuality and authority

The Training Incumbent will give feedback on a Curate's preaching; to what extent is s/he prepared to receive constructive feedback on his/her own? How far will an Incumbent welcome critique of his/her own practice, or encourage the Curate's strengths in areas where he himself feels less secure?

As far as is appropriate, accountability, evaluation and reporting should be openly shared as part of a mutual learning process. The Incumbent should hope to learn from his or her Curate, and discussion and feedback should be mutual. In enabling this, the supervisor will also be modelling both the learning task and the basic skills of supervision. The Incumbent needs to model the kind of attitudes and practices s/he would want to see in the Curate.

Nevertheless, it is the Incumbent who is invested with both the cure of souls for the charge and authority as a Training Incumbent. It is vital that both parties grasp and respect the nature of that authority. There will be times when the Training Incumbent may need to exercise that authority quite directly for the best interests of both congregation and Curate.

Curates should expect to serve three years in the Title post and will not be free to move to a new post without the consent and recommendation of the Bishop. It is good practice to plan for a stipendiary curacy to run on for a few months after the end of the three-year period. This allows those Curates who have met the required training outcomes a little more time to find a post. In addition, it means that it is impossible to run curacies back-to-back in the same church with the same Training Incumbent, but instead leaves a period of fallow time for reflection.

## Wider accountability

Curates should be helped to become aware, if they are not already, of their wider accountability. Their call narrative can be quite narrow; in discernment (and even training) the constant requirement to reiterate the circumstances of one's inner sense of calling tends to lead to the experience surrounding it can become a controlling – and defining - narrative.

Curates need to be helped to place that narrative in a larger vocational story that includes the needs of the Church. '*Vocation is not simply an individual path but a ministry bestowed as a member of a body.*'<sup>6</sup> Curates need to locate themselves within an understanding of what role Christian faith is playing in the life of the nation, what God might be doing through the Scottish Episcopal Church at this time, and what this means for each Diocese and Charge. Ultimately, the narrative of the SEC sits within the story of the mission of God in the world, and our lived understanding of what Christ is doing in us and through us.

It is important that Curates work consciously with this narrative and locate themselves within it. If this does not happen, then individuals construct a narrative from elsewhere: from their own personal needs, from the polity of another denomination, from secular sources. Every minister has a narrative that they live by, but not every narrative sits well with the mission and ministry priorities of the Scottish Episcopal Church at present. By spending time with the Bishops, those who are charged with discerning a vision for, and articulating the narrative of, the Scottish Episcopal Church, Curates can be helped to inhabit this *wider landscape and minister as the Church's representatives rather than as independent clergy*. Such a meeting between Curates and Bishop is effected both by diocesan gatherings and by occasional Provincial residential conferences.

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<sup>6</sup> Samuel Wells, *God's Companions: Reimagining Christian Ethics* (Oxford 2006), 82.

## SECTION 3 CONGREGATIONS

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*It takes a village to raise a child.*

African proverb

### Introduction

The primary purpose of a curacy is *the continuing formation of the Curate*; a candidate's initial training is not completed at the time of ordination. Rather, the full period of initial training is now viewed as running from the time of entry into the Scottish Episcopal Institute (SEI) until the completion of the curacy, the period known as 'Initial Ministerial Education 1-6' (IME 1-6). At the end of these six years, candidates should be competent to continue in representative public ministries.

To that end, there is a clear expectation that personal growth, development and learning continue through the curacy; the overruling consideration is always this need for ongoing training. Gone are the days when certain congregations always had Curates either because they were seen as 'large and important charges' or because there was a need for an extra pair of hands. Getting a Curate is not some sort of reward – though the experience of welcoming one definitely has its own rewards – but rather an indication that context and Training Incumbent can offer a valuable learning experience for the newly ordained.

Congregations have a crucial role to play in this task of ongoing formation. It is not the Rector's job alone to shape a Curate but that of Rector-and-congregation. The guiding criteria for the placement of a Curate today are not simply the presence of an Training Incumbent willing and able to act as the training supervisor but also - and equally importantly - the range of experience which a congregation and its surrounding context can offer.

The local congregation should thus see itself as an active partner in the training process. Members other than the supervising Training Incumbent have gifts, skills and experience which should not be overlooked in this continuing training period; particular ways in which these might be utilised are outlined later.

The placement of a Curate can be an exciting pathway to growth within the congregation. It can galvanise the Vestry and people to reflect upon and review the charge's vocation to be 'a local learning community', and can also encourage individual disciples to take their own learning and formation more seriously. A training charge often finds that its congregation develops valuable skills in critical-supportive feedback which have further spin-offs even once the trainee has moved on. Training congregations have the satisfaction of providing a learning environment that lays foundations for a person to exercise a lifetime's ministry in the wider Church, and often continue to feel connected to that person even once he or she has left the charge, following with interest the clergy person's ministerial pathway for years to come.

The following information is offered to enable the smooth running of a curacy for the benefit of all involved in the partnership.

## Process of discernment

A suitable context for a curacy is one which:

- can offer a suitably wide range of ministerial opportunities, including the experience of collaborative ministry
- is open to ongoing learning
- is world-facing and innovative, with a missional heart
- is willing to support the Curate, helping her/him in the role transition from lay to ordained status and developing ministerial competence
- is willing to grant the Curate, ungrudgingly, the time needed in order to take a full part in IME 4-6 activities in the diocese and further studies
- has an experienced Training Incumbent who can guide the Curate through the early stages of ordained ministry, with the relationship between Training Incumbent and Curate outlined in a Working Agreement which is properly evaluated on a regular basis
- offers a variety of missional, liturgical and pastoral experiences
- is not so large/niche/'successful' that the emergent Training Incumbent is unable or unwilling to function in more 'ordinary' charges at the end of her/his curacy.

Every year, Bishops identify those Training Incumbents and charges which are suitable for receiving a deacon the following year. Inevitably, the number of contexts on the list is greater than the number of potential Curates, but this ensures that there is a range of choices available in the discernment process.

Eighteen months before a candidate is to be deaconed the Bishop will contact the Rector and Vestry of a charge and suggest that they consider having a Curate; the stages and timeline for this process are detailed in Appendix 1.i. The *pro forma* which the charge will be asked to complete detailing the opportunities it can offer a potential Curate is found in Appendix 1.ii.

Bishops do not place Curates in charges where the Training Incumbent is expected to retire or to move on during the curacy. Nevertheless, this can happen from time to time. If a vacancy does arise, the Bishop is responsible for putting in place appropriate support mechanisms, ensuring that Curates remain Curates and do not step into the role of the Training Incumbent.

At present, stipendiary Curates are routinely appointed for a fixed three-year period. This means that they begin to look for their next post from mid-way through their third year. For those that do not find posts, the final six to nine months of their curacy can become adversely affected by anxiety. This is not conducive to good formation and learning. It is therefore good practice to plan for a stipendiary curacy to run on for a few months after the end of the three-year period. This would allow those Curates who have met the required training outcomes a little more time to find a post. In addition, it would mean that it would not be possible to run curacies back to back in the same church with the same Training Incumbent, but would instead leave a period of fallow time for reflection.

## Understanding each other

The Curate will need to spend a great deal of time listening to the context, getting the lie of the land, learning the local lore. Kenneth Leech once wrote:

*When I was a parish priest, I used to suggest to my Curates that they spend the first month in the parish doing nothing except wandering around, familiarizing themselves with the map of the district, getting it into their system. Discovering the shops, the pubs, the street corners, the faces at the bus stops and park benches, absorbing the smells, listening to the neglected voices of the neighbourhood, feeling its pulse: these are the vital prerequisites of good pastoral care. You cannot effectively minister in unfamiliar territory. Equally, you cannot minister to people whose culture you ignore, even despise<sup>7</sup>*

But such a 'listening process' needs to take place on the part of the congregation as well, especially if its experience of Curates dates back to the time when the majority were young, single men straight from school and university. Today the demographic has changed: the majority of Curates, male and female alike, are married; many have children; most partners have their own careers and so may not fulfil all the traditional expectations of a clergy spouse; if there are school-age children, housing and schooling are important issues for both partners.

Furthermore most Curates nowadays have also had experience of the workplace and so bring valuable insights and a deep sense of vocation formed through being called from an established career to ordained ministry - a considerable sacrifice, not least financially. Curates thus expect to be part of the leadership of the congregation from the outset. Training Incumbents and congregations need to be able to offer adequate supervision while allowing Curates to take on genuine responsibilities. Curates need to accept responsibility and to have the patience and the humility to receive supervision.

A third difference is that the context of ministry is now collaborative; ministry and leadership are shared, not just by the Training Incumbent and Curate but by others as well, whether there is a formal ministry team in the charge or not. Perhaps the most valuable learning experience for any Curate is to understand that Christian ministry is collaborative and relational rather than solo and hierarchical, and to learn how to work alongside lay ministers without indulging in a greedy ministry- grab. The appointment of a Curate must not lead to the handing over of existing valuable lay ministries, but rather to their greater flourishing; no-one should ever be pushed aside. One sign of a successful curacy is that when the Curate comes to leave, any aspects of ministry begun during the curacy can be easily sustained.

Good understanding comes from a proper clarification of expectations from the outset of the partnership. The primary place where expectations are clarified is the Working Agreement. This needs to be in place before a new Curate is ordained; a *pro forma* for such an agreement, reviewed annually, is found in Appendix 3.ii. The Agreement covers all areas of ministry, and is signed by the Training Incumbent, Curate, Vestry representative and Bishop, the signature of the Vestry representative signifying the commitment of the whole congregation to the pastoral support and ministerial formation of the Curate.

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<sup>7</sup> Kenneth Leech *Spirituality and Pastoral Care* Sheldon Press 1986, 92-93

## Continuing training and studies

One of the vital areas covered by the Working Agreement is that of the Curate's continuing studies and attendance at diocesan training events. As was made clear at the outset, a curacy is a time-limited post *for the purpose of continuing formation*; it is an integral part of the IME 1-6 continuum. The College of Bishops has approved Learning Outcomes which articulate the aims and expectations of training and provide criteria against which Curates are assessed at the end of those six years.

It is thus expected that continuing active learning is seen as an essential and integral part of the Curate's work, rather than an 'extra' to be squeezed into 'free' time. Curates should not be prevented by ministerial duties from participating fully in the IME 4-6 programme. The agreement of a congregation to receive a training Curate includes an agreement to allow that Curate to take part fully in such training and studies. This means that IME 4-6 events must be allowed to take precedence over those in the charge. Curates will therefore not be expected to deal with pastoral emergencies or take funerals if those conflict with IME 4-6 sessions. The agreement will also detail how any expenses incurred by Curates in attending IME events will be met.

Curates heading towards incumbencies – in other words, not those discerned to have a vocation to 'associate priesthood' – are required by the College of Bishops to have acquired a degree in theology by the end of the IME 1-6 period. Many ordinands have such a degree before entering their SEI studies; others study at one of the ancient Scottish universities during their IME 1-3 years and so acquire such a degree synchronously with their initial formation. But a few need to study for the *BA (Hons) in Theology, Ministry and Mission* offered by Common Awards via SEI during their IME 4-6 years. This requires them to amass 120 credits on top of the 240 credits already awarded via the DipHE, which they earned during IME 1-3. This will involve about one day a week being allotted to the Curate for study. This includes the sessions in which the Curate will participate with others engaged in the BA programme as well as the time needed to read, review and write. It is most helpful if this time is given in a block, for example, a set day per week. Rigorous theological study demands a broad space in which to step back from the hurried pace of active ministry to a more reflective and settled mode of being.

## Congregational support

Congregational members can assist greatly in a Curate's ongoing formation and training; within any charge there is a wealth of expertise in aspects of ministry as varied as theological reflection, public speaking, management skills, pastoral care and voice production. Some members will carry the history and the 'folk memory' of the charge; others will be able to provide an introduction to welfare, educational, industrial and communal institutions in the locality. Wardens, Readers and authorised Lay Ministers will have a particular role in explaining the responsibilities they fulfil in the church, and reflecting upon the relationship between clergy and laity. Lay members can also make a valuable contribution to the review of worship leading, preaching and teaching from their pew-based perspective, and can act as 'critical friends' to the trainee by offering supportive feedback.

It is good practice for the Vestry to discern and then formally appoint a few (4-6) people from the congregation with training expertise to form a Lay Support Group which will accompany the Curate throughout the IME 4-6 years; this is one way in which the Vestry can carry out its duty of care for the Curate as detailed in the Working Agreement. As well as having regular scheduled meetings with the Curate – at least one per term – members of this group might offer to supply feedback on preaching and worship leading from time to time using the feedback sheets in Appendices 3.iv and 3.v.

Members of this group will doubtless already be well-versed in the arts of evidence-based reporting and the giving of feedback; others in the charge may value reading something about these skills (see Appendix 4.i).

## In conclusion

Receiving the ministry of a newly ordained Curate is an exciting opportunity for a congregation. Not only will congregational life be enriched by an additional ordained minister bringing gifts, skills, experience, time and commitment, but members will have the opportunity to make a contribution to the future ministry of the Church, helping to equip a new minister to serve the strategic needs of the Diocese. The congregation will need to be aware, however, that having a Curate does not mean less work for the Training Incumbent but rather *far more* as s/he balances the competing responsibilities of being colleague, mentor and coach. This involves supervising the growth of the Curate in reflective practice, helping to hone their ministerial skills and modelling priestly behaviour; and all this on top of the usual work of an Training Incumbent. Vestries need to be cognisant of this increased workload before agreeing to take on a Curate, and make appropriate provision for the support of their Rector before so doing.

## SECTION 4 BISHOPS

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*Within the diocese the Bishop ordains and sends out new ministers,  
guides and serves the priests and deacons who share  
in the Bishop's responsibility to nurture the community of the baptised.*  
Scottish Ordinal 1984

### Introduction

The decisions regarding the ordination and appointment of Curates lie with the Bishops. They know that those they release in ministry under their authority should be aware of the mission and ministry priorities of the whole Church, and be able to serve in a range of contexts. Curates are trained to serve in the Province, and though few are universally deployable, many are able to serve in a variety of settings and traditions. The Bishops, as a College, pay attention to matters of deployment, especially as regards stipendiary curacies. They know that limited resources, and sometimes geography, can lead to decisions that are necessarily pragmatic. This need not result in inconsistencies in the provision of support for Curates or a lowering of the standards of the training offered.

The transition into public ordained ministry is demanding. The newly ordained require excellent support from Training Incumbents and training charges as they adjust to new roles and expectations. They also need good support from the Bishop, who has a particular responsibility to make sure that Provincial standards have been met in all aspects of training. This Handbook describes the framework for training through IME 4-6 for stipendiary and non-stipendiary Curates. It sets out standard processes to be used across the Province in each diocese.

### Aspects of Training

The Bishop responsible for a Curate will be paying particular attention to the following:

- identifying potential Training Incumbents and charges
- matching candidates to curacies
- sending the Curate a letter of appointment
- the organisation of ordination services
- annual review procedures and meetings with Curates
- end of curacy reviews
- communicating the missional narrative of the Scottish Episcopal Church
- ensuring that the mission and ministry priorities of the Province are known, and engaged with, by every Curate

The Bishop will not be able to do these things alone, but will work in collaboration with the Principal and staff of the SEI, as well as IME 4-6 Coordinators and administrative staff with particular roles relating to IME 4-6 within the diocese.

## IME 4-6 Coordinator

Every diocese will require one person to act as IME 4-6 IME 4-6 Coordinator, to oversee the training through the three year curacy. This person will be responsible for:

- providing opportunities for Curates to meet as a peer group to reflect on experience;
  - providing a programme that pays attention to transitional issues and growth of the person-in- role.
- overseeing the reporting processes, acting as a prompt for those from whom carefully prepared reports are due (aided by SEI)
- meeting on an annual basis with each training partnership of Training Incumbent and Curate to revise the Working Agreement to meet required training outcomes and plan training needs for the coming year to meet required training outcomes.

It is good practice for this person to be involved in the selection of potential training charges and Training Incumbents at diocesan level and in the review of the curacy as it comes to an end. Including the IME 4-6 Coordinator in these conversations in preparation for the College of Bishops' discussions helps ensure that each Diocesan is well prepared for the meeting of the College.

In dioceses where clergy resources are small, it might be that a Bishop decides to carry this responsibility him/herself. If this is the case, then the Bishop's Personal Assistant will need to give good attention to the annual calendar so that deadlines relating to selection processes for charges, Training Incumbent and annual reporting are met.

## Identifying Training Incumbents and Charges

Every year the Bishop will identify a number of possible Training Incumbents and charges. This list will provide a portfolio of options to offer when the College of Bishops places Curates.

Incumbents and Charges will have provided a completed *proforma* (Appendix 1 ii). This will be an essential resource in identifying the strengths and weaknesses of the potential curacy.

Every Training Incumbent will have some strengths and some weaknesses. However, it is essential that the Incumbent is keeping to a disciplined and life-giving pattern of prayer, is engaging in on-going learning and theological reflection related to ministry, and is committed to participating in all training for Training Incumbents offered by the Scottish Episcopal Institute. It would be helpful for the Bishop to ensure that knowledge of the individual Training Incumbent is up-to-date, by personal contact through an appraisal system, for example.

If a Training Incumbent has minimal recent experience in some area of ministry (for example, assemblies, *fresh expressions* of worship), then noting these before the curacy is fixed will allow the Bishop to plan for deficits to be met through ministry experience with other clergy in the diocese.

Similarly, a potential training charge will have strengths and weaknesses. It would be usual for charges to offer a great deal of experience in some areas, but less in others. Again, this should be noted before a curacy is fixed, with a plan in place to cover deficits. The plan might include opportunities to minister in other Charges to experience a full range of ministry.

Finally, the Bishop needs to note whether accommodation is available. There should be a clear description of the size, location and condition of what is on offer. If property needs to be rented, then some indication of the cost and common availability should be noted.

## Matching Ordinands to Curacies

The College of Bishops works together to place stipendiary ordinands into Training Charges. The same careful criteria need to be followed in the placing of non-stipendiary ordinands. In the placing of stipendiary Curates the College will be advised by the Principal of the SEI and the Provincial Director of Ordinands as to the strengths and particular needs of each person, including provision for family members and dependants.

When proposed matches of ordinands and curacies have been made, the next step will be for the ordinand to visit the charge and meet the Incumbent. Both parties, the incumbent and the ordinand, should feed back their responses to this meeting to their Bishop.

If there are questions from any party concerning the suitability of the curacy, these should be addressed before proceeding to an appointment. The issues raised could be of many kinds, including housing, further study, personal chemistry of the partnership and so on. Issues raised should be noted, and reassurances made in writing, not verbally. When all parties are confident, within reason, then an appointment can be made.

## Letters of Appointment

On appointing an ordinand to a curacy a standard letter of appointment should be sent to the ordinand by the Bishop and copied to the Training Incumbent, IME 4-6 IME 4-6 Coordinator, and other relevant parties. Conditions for the successful completion of the IME 1-3 training programme will be set out in this letter.

The appointment letter from the Bishop should also be copied to the Vestry. The Vestry might then want to send its own letter to the Curate-to-be, acknowledging receipt of the Bishop's letter and adding any local matters.

Please see Appendix 1.v for outline *pro forma* letters to Curates. On accepting an invitation to become a Training Incumbent, the cleric must sign the Training Incumbent Agreement (Appendix 1 iv).

## Ordination Services and pre-ordination retreats

It is assumed that ordination services for Deacons will normally take place around Michaelmas following the completion of training. The details of the service, including any decisions that ordinands are required to make concerning presenters and the like, should be clearly communicated as early as possible. Although this information might come from the Provost, it is the Bishop's responsibility to make sure that this communication has taken place.

Details of the service should include matters relating to the local custom regarding robes, choosing of readers and hymns, and any reception after the service.

It follows that the ordination services for priests will take place close to Michaelmas at the completion of the Deacon's year. Again, clear communication of dates and venues should be made following the first year review that should take place in May. It might be necessary for planning purposes to set dates aside for these services, but it should be clear that these are provisional on the outcome of the review.

It is the Bishop's responsibility to ensure that an ordinand make a retreat prior to ordination. This might be managed in many ways (individual retreats, group retreats, etc.) but should be paid for by the Diocese.

## Annual Review Procedures

Every Curate will be reviewed at the end of each of the three years. In reality this will be around May/June. In the third year, the review of the Curate will coincide with the review of the curacy as a whole.

The process for review will require three reports to be sent to the Bishop.

- (i) A report on the Curate from the Training Incumbent, assessing progress through the previous year, seen and signed by both parties.
- (ii) A report from the Curate assessing their progress through the previous year seen and signed by both parties.
- (iii) The Record of Supervision conducted during the year (Appendix 2.i) completed by the Curate and signed by both parties.

In preparing the reports, the Training Incumbent and Curate will use the *proforma* (Appendix 2.iii), paying attention to the outcomes required at the end of year six of training (Appendix 3.i). Individual Bishops might choose to ask for additional information, for example, sample sermons or other ministerial output that gives an insight into the theology and development of the Curate.

After receiving the reports, the Bishop will meet with the Curate to reflect on the year. In this schedule the Bishop will be meeting with each Curate annually, some time in June.

At the end of this review process, the IME 4-6 Coordinator will meet with the Curate and training incumbent to revise the Working Agreement, if necessary, and to set priorities for training in the coming year.

The outcomes from this review process will also inform decisions concerning future appointments.

## End of Curacy Review

Towards the end of the curacy, around May of the third year, the Curate will have his/her final review. At this time, it will be essential to review the success of the curacy as a whole.

The review of the curacy will be concerned with identifying the strengths and weaknesses of the training offered by a particular partnership of Training Incumbent and charge. The purpose of this review will be for the Bishop and the diocese to be growing in its learning about what makes a training post successful, as well as offering an opportunity to make adjustments to the shape of the package on offer.

It will not be appropriate for a Bishop to offer a Training Incumbent and Charge as a context for a curacy to the College of Bishops without a review having taken place. Where such a training post is being considered for the placement of a Curate, the outcomes of the review must be shared with the College.

## Provincial Narrative

It is the Bishop's responsibility, individually and as part of the College of Bishops, to ensure that Curates have good knowledge of, and are engaging with, the Provincial and Diocesan narratives relating to mission and ministry.

The whole church is enabled in its mission and ministry if it has an understanding about the role that Christian faith is playing in the life of the nation, what God might be doing through the Scottish Episcopal Church at this time, and what this means for each Diocese and Charge. The Church is encouraged and directed when these things are articulated clearly and regularly, particularly by the Bishops. Ultimately, the narrative of the SEC sits within the story of the mission of God in the world, and our lived-out understanding of what Christ is doing in us and through us.

It is important that from the first exploration of vocation through to taking up posts of responsibility as ordained ministers, all work consciously with this narrative and locate themselves within it. If this does not happen, then individuals construct a narrative from elsewhere - from their own personal needs, from a church network outside of the SEC, from secular sources. Every minister has a narrative that they live by, but not every narrative sits well with the mission and ministry priorities of the SEC at present.

Those in IME 1-3 are greatly helped and encouraged by having good quality contact time with the Bishops, and reflecting with them about the content and priorities of the ministries for which they are preparing. Such contact needs to be maintained through IME 4-6. This will include occasional opportunities for a whole cohort to be brought together for a Provincial residential conference to sharpen vision and expectations.

The Provincial narrative, and its outworking in priorities for mission and ministry, will be shaped and developed at diocesan level. It is essential that the Bishop ensures that every Curate has knowledge of the diocesan narrative, and the mission and ministry priorities that are related to it. This will include having confidence that the Training Incumbent and the charge (Vestry and people) are well informed about these matters, and are actively using them to plan mission and ministry priorities in the charge.

## APPENDICES

### 1. Forms for use prior to receiving a curate

#### Appendix 1.i: Timeline for the assigning of Curates

DATE	TASK	BY WHOM?	NOTES
Spring of IME 2 year for ordinand	<b>Curacy shaped in congregation:</b> <ul style="list-style-type: none"> <li>• Training Incumbent</li> <li>• Scope of Ministry</li> <li>• Finance</li> <li>• Housing</li> </ul>	Bishop / Rector / Congregation	Need commitment of all to support potential curacy
May of IME 2	<b>Description of curacy offers finalised</b>	Bishops	Bishops write descriptions of curacy offers to begin in the following September; circulated to other Bishops and SEI staff
IME 2 Appraisal Conference	<b>Assessment of any special training needs</b> of ordinand	Those present at IME 2 Appraisal Conference	
Summer of IME 2	<b>Curacies potentially matched to ordinands</b>	Principal of SEI	In consultation with SEI staff
End of IME 2	<b>Preparation of ordinands</b> for curacy process  Families' session at May RWE	Principal of SEI, Diocesan Adviser and resident Bishop at May RWE.  SEI staff	Explanation of deployment expectations, obedience and sacrifice; outlining of theology degree progress if applicable; discussion of family needs and context
Late August/ September of IME	<b>Curacy matching finalised</b>	College of Bishops	PDO and Principal of SEI
Autumn of IME 3	<b>Curacies offered to 'Incumbent status' ordinands mid-September</b> (public disclosure)	Bishop and ordinand	Bishop informs candidate and IME 4-6 Officer in mid- September
Winter of IME 3	<b>Curacies offered to 'Assistant Clergy' ordinands - end of March</b> (public disclosure)	Bishop and ordinand	Bishop informs candidate and IME 4-6 Officer by end of March
May of IME 3 following Final Appraisal Conference	<b>Ordination and Ordination retreat dates</b> circulated	Bishop, Training Incumbent and ordinand	
Early summer IME 3	<b>Draft Working Agreement drawn up</b>	Bishop, Training Incumbent and ordinand	Includes start and end date of curacy
Late summer/autumn	<b>Ordination Retreat</b>	DDO, Bishop and ordinand	This is organized by the diocese. Robing grant disbursed

## Appendix 1.ii: Congregational *pro forma*

*Pro forma for charges seeking to become training settings, to be completed by the Rector and the Vestry.*

**Name of Charge:** \_\_\_\_\_

**Context** – general description including the following details:

setting and surrounding community/ies: size of population, types of housing, kinds of jobs people do, institutions (e.g. hospitals, schools, residential homes), social mix

type of congregation (mainly local/gathered/niche)

ecclesiastical tradition/s and patterns of worship

mission statement; vision and priorities for the charge

membership and money

frequency of occasional offices in the past year

the capacity for undertaking training at this juncture

the reasons for wishing a Curate at this juncture

**Training Incumbent** - description of length and type of service, churchmanship, particular gifts, experience of supervision, etc.

**The curacy offers the following range of experiences to a Curate in training;** describe the following, as applicable:

the range of worship opportunities

the type of missional opportunities

the charge's strategic direction and attitude to change management

how team working and lay leadership function the make-up and functioning of the Vestry

how the whole people of God are resourced theologically

the level and manner of community engagement

the level and manner of ecumenical engagement

the level and manner of engagement with the Diocese and wider Province

**The curacy will include** - general description including the following details:

provision for regular supervision

day off, holidays and retreat provision

provision for IME 4-6 study time

how the charge will offer support, encouragement and allow the new Curate to develop

**Terms and Conditions** – detail how the following provisions are to be met:

stipend, NI, pension

housing

expenses – telephone, car, stationery, study, retreat

**Signed and dated by the Rector:** \_\_\_\_\_

**Signed and dated by Vestry representative:** \_\_\_\_\_

**Bishop's comments**

**Signed and dated:** \_\_\_\_\_

## Appendix 1.iii: Welcoming a Curate

- Minimum standards for clergy housing  
<http://www.scotland.anglican.org/vestry-resources/appointments-and-employment/minimum-standards-for-clergy-housing/>

On the appointment of a new cleric, and before occupancy, the Vestry should consult the new occupant as to the internal decor of the property, which should be to a reasonable standard.

### Prior to the move

- If there are pre-school/school-age children, some sharing of local knowledge prior to the move is invaluable.
- Is the house clean and does it need to be redecorated?
- Does someone need to be present if new carpets are to be laid before moving day?
- Are there any building works that ought to happen before moving day?
- Has anyone tidied the garden tidy, cut the lawn etc.?

### Moving day

- Who has the keys? Can someone be there to greet the new arrival/s?
- Ensure that the electricity, gas, telephone all work from day 1.
- What arrangements have been made about internet provision?
- Would a small parcel of food be a good idea?
- If there are small children, can someone offer to help look after them?
- Would some help to move the furniture that inevitably ends up in the wrong place be appreciated?
- Could someone provide a hot meal to take round?
- Is there a list of local shops and opening times?

### **Shortly afterwards, Incumbents must ensure that they**

- help the Curate navigate tax issues; what can be claimed as a legitimate expenses etc.
- introduce him/her to the Treasurer who can talk through the issues of expenses and other financial matters
- introduce him/her to key ecumenical colleagues
- chaperone them at first area/regional council meeting

Settling in to a new locality is always difficult. For a Curate, their closest working colleague is also their immediate boss and thus it is not always easy to ask basic 'settling in' questions of him/her. This is another reason why the existence of a Lay Support Group is invaluable. Be aware of the needs of single Curates, while respecting their independence. It is good practice to ensure they are invited out early on for meals with a wide range of people. Some Training Incumbents have found it useful to ask the Lay Support Group to look out for any signs that the Curate and/or family is not coping or has a problem in some way or other. Sometimes the Training Incumbent is part of the problem.

## Appendix 1.iv: Training Incumbent Agreement

Those accepting an invitation to become Training Incumbents are asked:

- **to develop a prayerful, collegial training relationship** with the Curate, which may embrace differences in tradition, theology and temperament.
- **to indicate that they do not expect to move post while training the Curate**, and to make a firm commitment to remain for at least the first two years (IME 4-5)
- **to formulate a Working Agreement** with agreed expectations, patterns of work, training and supervision, and to review and revise this plan annually.
- **to work with the Formational Outcomes** in making Working Agreements and Training Plans over the duration of the curacy.
- to meet regularly with the Curate for **supervision**, understood as focussed time for the theological reflection and pastoral support.
- to ensure that the Curate has **adequate study time** and attends **IME 4-6 training events** provided by the diocese
- **to provide written, evidence-based reports** as requested by the Bishop at the end of IME 4 and in the spring term of IME 6. (i.e. Priesting Report and End of Curacy Assessment)
- to attend the **preliminary Training Incumbents' training**
- to engage in a suitable **review of their work as a Training Incumbent** at the end of the curacy
- to be **familiar with the IME 4-6 Handbook**
- to work in **partnership with the person who holds the IME 4-6 portfolio in the diocese, and with SEI** where appropriate.

I have read and accept the recommendations and expectations

Signed \_\_\_\_\_

Date \_\_\_\_\_

## Appendix 1.v Outline *pro forma* of letters to Curates

However these two letters are rephrased, they should contain reference to each of the subjects mentioned. Adjustments will need to be made for part-time appointments.

### (a) 'Incumbent status' curate (formerly stipendiary clergy)

Dear

I am pleased to offer you the appointment of full-time Assistant Curate in

---

with effect from \_\_\_\_\_ (*usually the date of ordination*). This offer is subject to the satisfactory completion of your course of training and to you completing the CRB process satisfactorily; the Assistant IME 4-6 Coordinator for the Protection of Children and Vulnerable Adults will be sending you details of the latter. I am writing now to let you know the formal terms and conditions. Details of the ordination arrangements, including retreats and the purchase of robes, will come to you in due course from others.

Your stipend will be on the provincial scale:

Grade A	Priest in 3rd and subsequent years	
	Deacon in 4th and subsequent years	95% of Standard Stipend
Grade B	Priest in 1st and 2nd years	
	Deacon in 2nd and 3rd years	92.5% Standard Stipend
Grade C	Deacon in 1st year	90% of Standard Stipend

You will be provided with accommodation at \_\_\_\_\_ free of rent, repairs, Council Tax and insurance on the house itself. You are entitled to the reimbursement of expenses reasonably incurred in connection with the exercise of your office. Such reimbursement is the responsibility of the Vestry of the charge/s in which you serve. You do not retain fees for occasional offices.

Clergy moving to a new charge in the Province may apply for a resettlement grant; see:

<http://www.scotland.anglican.org/vestry-resources/appointments-and-employment/resettlement-grants/>

**However Curates should apply in the first instance to the charge to which they are moving for assistance with the cost of removal.**

You will have one day off every week, details of which will be agreed on the Working Agreement you draw up with your Training Incumbent. You are entitled as appropriate to maternity, paternity, parental and adoption leave, as specified in the Personnel Handbook for Stipendiary Clergy.

Your training is to be provided in accordance with a Learning Agreement between you and your Training Incumbent, which sets out what is expected of you and your Training Incumbent. You have a duty to participate in and complete any training provided for you.

Your office will come to an end on \_\_\_\_\_. You are expected to have satisfactorily completed your training by this date. You are required to give at least 3 months' notice if you wish to resign your appointment. This period may be waived by agreement between you, your Training Incumbent and the Diocesan Bishop.

In response to this formal offer of the appointment, will you please complete the section at the foot of the enclosed duplicate copy of this letter and return it to me as soon as possible.

(FOR FOOT OF DUPLICATE LETTER)

I confirm my acceptance of this post and understand the terms and conditions of the offer.

Signed ..... Date .....

**(b) Assistant clergy (formerly non-stipendiary curate)**

Dear

I am pleased to offer you the appointment of 'Non-Stipendiary' Assistant Curate in

\_\_\_\_\_ with effect from \_\_\_\_\_ (*usually the date of ordination*).

This offer is subject to the satisfactory completion of your course of training and to you completing the CRB process satisfactorily; the Assistant IME 4-6 Coordinator for the Protection of Children and Vulnerable Adults will be sending you details of the latter. I am writing now to let you know the formal terms and conditions. Details of the ordination arrangements, including retreats and the purchase of robes, will come to you in due course from others.

Every Assistant Curate, before being licensed, shall produce to the Bishop the appropriate Letters of Orders and testimonials as required by Canon 13, Section 3, and make the subscriptions prescribed by Canon 12.

In the Charge(s) there will be arrangements to provide you with a place to work undisturbed, and a space where you can hold pastoral conversations. You are entitled to the reimbursement of expenses reasonably incurred in connection with the exercise of your office. Such reimbursement is the responsibility of the Vestry of the charge/s in which you serve. You do not retain fees for occasional offices. The details of these things will be set out in your working agreement.

Your Working Agreement will also set out the expectation of working hours, including the times when you will not be available.

Your ongoing training is to be provided in accordance with a Learning Agreement between you and your Training Incumbent, which sets out what is expected of each party. You have a duty to participate in and complete any training provided for you.

The training through the IME 4-6 period will come to an end on \_\_\_\_\_ before which time future deployment will be discussed with you. You are expected to have satisfactorily completed your training by this date.

The appointment of a Non-Stipendiary Assistant Curate is terminable on three months' notice given after consultation with the Bishop by either party to the other, unless otherwise agreed by the parties with the approval of the Bishop, and the Bishop shall then cancel the licence; but if the appointment is conferred by a Title to the Diaconate, it is only terminable during the next two years by mutual consent of both parties, and with the sanction of the Bishop, or if by a Title to the Priesthood, during the year following ordination to that office with like consent and sanction.

The authorisation may be withdrawn by the Bishop at any time for any cause which the Bishop shall judge to be good and reasonable, after having given the Rector and the cleric concerned sufficient opportunity of showing reason to the contrary, but an appeal shall lie to the Episcopal Synod.

In response to this formal offer of the appointment, will you please complete the section at the foot of the enclosed duplicate copy of this letter and return it to me as soon as possible.

*valediction*

(Signed) .....

(FOR FOOT OF DUPLICATE LETTER)

I confirm my acceptance of this post and understand the terms and conditions of the offer.

Signed .....

Date .....

## 2. Forms for review during and after a curacy

### Appendix 2.i: Record of supervision template

It is the Curate's responsibility to ensure that a Record of Supervision is filled in following each meeting, and that at the end of the year it is copied, signed and sent to the Bishop along with the reports from the Curate and Training Incumbent.

Date	
Topic Discussed	
Action agreed	

Date	
Topic Discussed	
Action agreed	

Date	
Topic Discussed	
Action agreed	

At the end of the year (or when requested), the Curate and Training Incumbent sign the document as a fair record before it is sent to the Bishop

Curate \_\_\_\_\_ Incumbent \_\_\_\_\_

Date \_\_\_\_\_

## Appendix 2.ii: Debriefing of the Training Incumbent at the end of a curacy

The Training Incumbent should fill in the second column of the form below and send the comments to the Bishop before meeting with him to talk over the experience. This meeting should take place after the Bishop has met with the Curate at the end of his/her third year. The Bishop will fill in the third column in the light of the meeting and send the completed form back to the Incumbent within a week of the meeting.

*Expand as required*

Area of ministry	Reflection on how the activity has gone. E.g. how faithfully carried out; value of activity and outcomes; time spent on activity; effect on Training Incumbent; effect on congregation	Comments in the light of the meeting
Regular daily prayer with the Curate		
Drawing up and review of the Working Agreement		
Staff meetings for administrative purposes		
Supervision sessions for reflection		
Training of Curate in ministerial skills		
Helping the Curate meet the IME 4-6 Formational Outcomes		
Enabling Curate's engagement with Diocesan IME 4-6 programme		



## Appendix 2.iii: *Pro forma* to be used for Annual Review

Curate's Name:

Training Incumbent's Name:

Date:

In preparation for the review meeting, Curate and Training Incumbent should both prepare a report addressing the headings below. These reports should be exchanged at least a week before the meeting.

**General opening paragraph**

### **Summary of development mapped against each of the Formational Outcomes**

A. What development has there been in the last year in the area of '**Christian tradition, faith and life**', and what development may be looked for in the coming year?

B. What development has there been in the last year in the area of '**Developing discipleship**', and what development may be looked for in the coming year?

C. What development has there been in the last year in the area of '**Spirituality and worship**', and what development may be looked for in the coming year?

D. What development has there been in the last year in the area of '**Personality and character**', and what development may be looked for in the coming year?

E. What development has there been in the last year in the area of '**Relationships**', and what development may be looked for in the coming year?

F. What development has there been in the last year in the area of '**Leadership, collaboration and community**', and what development may be looked for in the coming year?

G. What development has there been in the last year in the area of '**Vocation and ministry**', and what development may be looked for in the coming year?

**Summarising conclusion**

**Priorities for the coming year**

Name of Training Incumbent \_\_\_\_\_

Name of Curate \_\_\_\_\_

Date \_\_\_\_\_

Please send to the Bishop within a week of the meeting

## Appendix 2.iv: Annual Review Part 2 Record of Training Needs

We have identified the following priorities for the Curate's training in the charge in the year ahead
We have identified the following training needs which we think should be provided by the Diocese
We have identified the following training needs which we think should be provided by the Province

Name of Training Incumbent \_\_\_\_\_

Name of Curate \_\_\_\_\_

Date \_\_\_\_\_

Please send to the Bishop within a week of the meeting,  
and send copies to the Diocesan IME 4-6 Co-ordinator and [principal@scotland.anglican.org](mailto:principal@scotland.anglican.org)

### 3. Tools for use during a curacy

#### Appendix 3.i: Formation Criteria Learning

**Outcomes** The Formation Criteria are goals to work and develop towards rather than criteria that can be 'fully met'. They should be used as a vocational tool:

1. by Curates to provide a framework for reflection on their development in ministry against the Church's expectations through the curacy training process.
2. by Training Incumbents to discern areas of development during the curacy and provide evidence of the readiness of ministers to take up Associate Priest or Incumbent status posts.
3. by Bishops as a framework to enable them to confirm the Curate's readiness to take up ministerial posts as priests at the end of IME Phase 2.

#### A. CHRISTIAN TRADITION, FAITH AND LIFE

*Ordained ministers sustain their public ministry and personal faith in Christ through study and reflection that is open to new insights. They ...*

- understand the Bible as text and as holy Scripture for the church and the world through regular critical engagement with Old and New Testament texts and issues relating to their interpretation.
- are able to interpret Scripture in a wide range of settings, using their exegetical and hermeneutical skills to communicate clearly and accurately in ways that enable others to learn and explore.
- are able to engage in independent study of Christian beliefs and practices and communicate their findings in diverse settings.

*Ordained ministers work with and value the breadth and diversity of belief and practice within the Scottish Episcopal Church. They ...*

- are able to engage in independent study of how Christian beliefs and practices shape the moral life of individuals and communities.
- are able to reflect critically on how Christian doctrine and ethics relate to discipleship, church and society, communicating this appropriately inside and outside the church.
- are able to work with different traditions of theology, ministry, mission and liturgical practice

*Deacons understand the importance of the community's reading of the Bible in the light of Christian tradition. They ...*

- have become proficient in appropriate contextualisation and application of Biblical teaching.
- are committed to the proclamation of the Good News of Jesus Christ in the community.
- can be an articulate and effective public apologist for the Christian faith

**CHECKLIST OF AREAS OF EXPERIENCE/EXPERTISE: CHRISTIAN TRADITION, FAITH AND LIFE**

- Involvement in Baptism and Confirmation preparation
- Work with Sunday School/youth group Funeral visiting
- Familiarity with adult education methods
- Intentional use of scripture in theological reflection (during regular supervision sessions)
- Writing for the parish magazine
- Development of hermeneutical and exegetical skills in a range of preaching styles (see also preaching)

**IME 5-6**

- Home group/Bible study leadership in different contexts
- Leading discussions in congregation on contentious/topical issues
- Articulation of the gospel in a range of settings: residential homes, schools etc.
- Developing a range of communication skills
- Identifying and nurturing gifts and skills of others
- Engagement in local issues; considering the place of faith in public debate and, if possible, speaking at a public meeting
- Writing a pastoral letter in place of Training Incumbent for parish magazine/web

**Performance evidence:** what was done; accounted for through reports - verbal or written

**Range:** the variety of situations in which it should be done

Note – a particular type of ministry experience might result in outcomes meeting several criteria. (For example, leading a Bible study group might outcomes relating to leadership, Christian faith, relationships, spirituality and so on.)

A. CHRISTIAN TRADITION, FAITH AND LIFE

<b>Performance Evidence</b>	<b>Range</b>
Accounts from a range of settings in which Christian doctrine and tradition and biblical truth have been interpreted and communicated in an engaging and thought-provoking way which produces a transformative response from others.	Church settings, community settings, pastoral settings, including those related to the pastoral offices.  Study and/or reflection relating to biblical studies and hermeneutics, mission, pastoral issues, worship and in relation to their own journey of faith and discipleship.

Performance Evidence	Range
Account of how they have used and interpreted scripture in such a way that others have demonstrably learned about biblical texts and have engaged independently with scripture as a result in a life-transforming way.	Preaching, teaching, leading bible study groups; leading enquirers, nurture and discipleship groups. In pastoral encounters in relation to occasional offices, ministry to the sick and dying and in mission.
Account of how and why the relative importance of different Christian beliefs and practices has changed and developed for them during IME 4-6.	Personal discipleship, public ministry within and beyond the church. Ecumenical settings. Other traditions within the SEC.
Personal account of spiritual journey as a Christian. Personal evidence of Biblical study for devotional purposes. Accounts from others using evidence from public ministry and personal encounter.	Has been able to articulate dependence and trust upon God in personal conversation, within group settings, in preaching and in testimony to others.

## B. DEVELOPING DISCIPLESHIP (MISSION, EVANGELISM AND DISCIPLESHIP)

*Ordained ministers have a deep and prayerful enthusiasm for mission and evangelism that is nourished by Christ's love for the world and lived out in acts of mercy, service, justice and reconciliation. They ...*

- a. are able to discern God's mission in a specific context by reflective and empathetic engagement with it in light of its cultural, historical, economic, social, political and religious characteristics.
- b. are able to engage courageously in mission, evangelism and apologetics in a range of contexts and particularly in local communities and churches.
- c. are able to communicate the gospel confidently and effectively using a variety of media in diverse situations, both inside and outside the church.
- d. are able to lead and inspire others in mission and evangelism in the local church.

*Deacons put into practice their enthusiasm for and understanding of mission. They ...*

- e. think strategically about mission and enable its implementation
- f. nurture the prophetic element of a deacon's ministry and the call to empower others
- g. are experienced in interpreting the local context and communicating their understanding to the church community

*Ordained ministers are committed to Christian education, promoting good practice, both inside and outside the church. They ...*

- h. are able to nurture others in their faith development, including those with little previous knowledge of the faith, through catechesis, teaching and preaching, including preparation for baptism and confirmation.
- i. understand the importance of the Scottish Episcopal Church's engagement with schools/young people outwith the church

*Incumbents ...*

- j. lead, enable and release missional vision and faithful witness in and among those for whom they have responsibility.
- k. enable others to articulate the gospel and participate in its proclamation.
- l. are able to foster and lead mission-shaped churches

<b>CHECKLIST OF AREAS OF EXPERIENCE/EXPERTISE: DEVELOPING DISCIPLESHIP</b>
<b>IME 4</b>
<ul style="list-style-type: none"> <li>• Awareness of, and increasing familiarity with, local context, particularly the social profile, gifts and needs</li> <li>• Understanding of the engagement in mission by the local church, including its strengths and weaknesses.</li> <li>• Understanding the diocesan mission policy</li> </ul>
<b>IME 5-6</b>
<ul style="list-style-type: none"> <li>• Lead baptism and confirmation preparation classes</li> <li>• Ability to present the Gospel to those of little or no church background</li> <li>• Experience of groups, using courses (Alpha, Emmaus, Pilgrim etc.)</li> <li>• Enabling/equipping others for their mission and evangelism</li> </ul>

**B. DEVELOPING DISCIPLESHIP (MISSION, EVANGELISM AND DISCIPLESHIP)**

<b>Performance Evidence</b>	<b>Range</b>
Accounts from a range of settings in which gospel truth has been communicated in ways that the hearers understand, including on an impromptu basis, and critical reflections from themselves and others.	Church settings, including formal worship and teaching to adults, young people and children, and in an all-age context.  Community settings, necessarily including occasions when the priest has initiated the faith conversation  Pastoral settings, including the pastoral offices and speaking of the Christian hope at time of death and to the bereaved.  School settings.
Accounts from individual with whom they have worked to foster a mission shaped initiative.	Both continuing and fresh expressions of church.
Account of engagement with a contemporary culture, and the challenges and opportunities it has presented for mission and evangelism, including evidence of sustained relationships with people outside church.	Both within the immediate congregation and outside the church setting.
Account of enabling others to continue to explore and deepen their personal relationship with God. Account from themselves and others of ways in which they have taught and encouraged people to articulate gospel truths and participate in their proclamation.	Both within the immediate congregation and outside the church setting.

Performance Evidence	Range
Account of how reflection on the mission of God is integrated with their practice of ministry.	Both within the immediate congregation and outside the church setting.
Account of how they have raised awareness of and engagement with the marks of mission, including reflections from those involved.	Both within the immediate congregation and outside the church setting.
Account from self and evidence from lay and ordained colleagues of reflective process in relation to taking up a variety of roles in mission.	Public ministry and ministry to groups and individuals
Account from self and from others involved in change management of the facilitation of change in church and communal settings	Settings in larger and smaller church community contexts

### C. SPIRITUALITY AND WORSHIP

*Ordained ministers are sustained by disciplined personal and corporate prayer shaped by the responsibilities of public ministry and corporate worship in the tradition of the Scottish Episcopal Church. They ...*

- are able to relate different approaches to, and traditions of, personal and corporate prayer to sustain and develop their own prayer life and those of others of all ages, backgrounds and in a range of life circumstances.

*Ordained ministers ...*

- are able to demonstrate good reflective practice in preaching and in leading – and where appropriate, presiding at – public worship, including pastoral services, using appropriate forms of liturgy in a variety of settings.

*Ordained ministers are growing in the love of God and in Christ-likeness as members of the body of Christ and can testify to the grace of the Holy Spirit in their lives and ministries. They..*

- draw on varied resources and traditions to develop their own spirituality and sustain them in the joys and strains of public ministry
- can discern God’s presence and activity in their relationships and in the wider world
- view and relate to others inside and outside the church in ways which spring from their own relationship with God

*Ordained ministers nurture the spiritual development of others. They ...*

- are able to help others discern God’s presence and activity in their relationships and in the wider world.
- use different approaches to develop the spirituality of people of all ages, backgrounds and in a range of life circumstances.

*Deacons ...*

- have developed ways of sharing the spiritual life of the community they are sharing
- are confident in inhabiting the deacon’s role liturgically and can communicate its meaning and significance

*Ordained ministers are sustained in the strains and joys of leadership by a life of prayer.*

## CHECKLIST OF AREAS OF EXPERIENCE/EXPERTISE: SPIRITUALITY AND WORSHIP

### WORSHIP LEADING

#### IME 4

- Leadership of Morning/Evening Prayer
- Deaconing at Sunday Eucharist
- Engaging in other forms of public worship
- Proper use and care of reserved sacrament
- Active part in the liturgy of Baptism and the preparation of candidates
- Funerals – church, crematorium
- Leading intercessions
- Learning how to celebrate as ordination to presbyterate approaches

#### IME 5-6

- All commonly-used authorised services, both said and sung
- Weddings
- Working with music and musicians
- Use of oils
- Legal aspects of liturgical ministry and administration of the sacraments (e.g. canon law, copyright etc.)
- Issues in and experience of worship in *Fresh Expressions of Church*
- Continued practical awareness of traditions other than own Sacramental confession

### PREACHING

#### IME 4

- Sunday Eucharist
- All-age worship
- Funerals
- Baptisms
- Services with a high proportion of non-regular churchgoers

#### IME 5-6

- Weddings
- Special services e.g. harvest, Remembrance
- Non-traditional sermons e.g. use of multi-media, interviews etc.
- Preaching with notes if normally a script preacher
- Informal worship e.g. cafe style
- Public speaking which is not preaching

### PASTORAL

#### IME 4

- Bereavement and post-funeral visiting
- Visiting the sick at home and in hospital
- Development of listening skills
- Awareness of own limitations

#### IME 5-6

- Working with volunteers and pastoral management
- Healing services
- Care of the dying
- Pastoral care of people with mental illness
- Engagement with spirituality of communities outwith the congregation

### C. SPIRITUALITY AND WORSHIP

Performance Evidence	Range
Be able to describe a daily and weekly pattern of prayer and additional support that has been used e.g. retreats, Spiritual Director. Be able to describe a spiritual journey.	Pattern of prayer includes; Daily devotion Corporate worship at least weekly, retreat time, peer support e.g. Spiritual Director, Cell group
Evidence of sustained study and reflection throughout IME 4-6. Account of how particular pieces of study or reflection have had an impact on their public ministry.  Evidence of a thought through commitment to ongoing study and reflection to include specific plans for further continuing ministerial development.	Study and reflection relating to a variety of aspects of ministry, including the leading of worship, preaching, and leadership styles and issues.
Accounts of acts of worship that the individual has led including critical reflections form themselves and others Preside in public worship in a way that fosters rich corporate worship, taking account of local context and the traditions of the SEC and engaging with lay people within their own leadership roles	A variety of acts of worship including, all-age, different church traditions, Eucharistic/non-Eucharistic, formal and informal, Scottish Prayer Book, 1970 and 1982 liturgies, fresh expressions in worship inside and outside of church including collective worship in schools
Account from self of reflective process and from others of the nature of changed actions	Reflection in a range of disciplines e.g. theology, psychology, sociology: applying these skills in a variety of church and community settings
Account of an example where they have exercised creativity and demonstrated openness to new insights in the practice of ministry within the Church.	Study and/or reflection relating to biblical studies and hermeneutics, mission, pastoral issues, worship and in relation to their own journey of faith and discipleship.

### D. PERSONALITY AND CHARACTER

*Ordained ministers show insight, resilience, maturity and integrity in the pressure and change entailed in public ministry. They ...*

- are able to balance appropriate care of self with the care of others by developing sustainable patterns of life and work, and effective support networks in the context of public ministry.

*Ordained ministers are growing in self-knowledge and commitment to Christ within the roles and expectations of ordained ministry. They ...*

- are able to approach the sacrificial impact of ordained ministry on the whole of life with wisdom and discernment.
- are able to reflect with insight and humility on personal strengths, weaknesses, failures, gifts and vulnerability in response to a new context of public ministry.

*Deacons ...*

- have an outgoing personality that is keenly aware of and responsive to need, both in individuals and in society as a whole.

*Incumbents ...*

- encourage and enable colleagues to balance appropriate care of self with care of others.

*Incumbents personify an integration and integrity of authority and obedience, leadership and service. They ...*

- engage with others to reflect with insight on their style of leadership, its strengths and weaknesses in context, and demonstrate appropriate development.

<b>CHECKLIST OF AREAS OF EXPERIENCE/EXPERTISE: PERSONALITY AND CHARACTER</b>	
<b>IME 4</b>	
<ul style="list-style-type: none"> <li>• Reflection on being a public minister</li> <li>• Familiarity with the <i>Guidelines for the Professional Conduct of the Clergy</i></li> <li>• Development of appropriate working rhythms, including time off</li> <li>• Development of support networks</li> <li>• Personal safety awareness</li> </ul>	
<b>IME 5-6</b>	
<ul style="list-style-type: none"> <li>• Familiarity with tools for self-awareness/personality type</li> <li>• Strategies for ensuring a proper work/life balance as ministry develops</li> <li>• Attention given to non-church interests and activities</li> <li>• Utilisation and integration of previous experience and skills</li> <li>• Articulation of the ordained life to others</li> <li>• Understanding and exercise of different types of authority</li> </ul>	

#### **D. PERSONALITY AND CHARACTER**

<b>Performance Evidence</b>	<b>Range</b>
Account of rule of life governing matters of prayer, theological reflection, ongoing study, personal discipleship, relationships and time for rest, recreation and leisure.	Church settings, community settings, pastoral settings, including those related to the pastoral offices and school settings.
Account from self and from colleagues of abilities to be creative and flexible in patterns of self-care, to model the value of such patterns in public ministry and speak prophetically to the prevailing culture. Building creatively on supportive networks, as a result of which accountability and freshness are maintained, and reflected in public ministry.	Appropriate pattern of days off and holiday; one-to-one and corporate patterns to support self
Accounts from Training Incumbent and other colleagues and others of process of personal reflection and discernment	Takes time to listen to the promptings of the Spirit in prayer, through scripture, through the words of others.
Accounts from self and others of loving service, demonstrating humility and grace	Engages in loving service, as part of personal discipleship in a wide variety of settings, in the local church and the community including the mundane and menial.
Account from self and others of how the ordained role has led to loving service	Engages in loving service, within role as Deacon or Priest in a wide variety of settings, in the local church and the community, including the mundane and menial.

Performance Evidence	Range
Accounts from those involved in collaborative working under Curate's leadership and others in positions of authority within the church of styles of leadership that enable the gifts, experiences and insights of all to be used for the common good.	Engages in collaborative leadership in a variety of ways e.g. of a working group within church or community, of acts of worship involving lay leadership,
Accounts from those experiencing the oversight and Training Incumbent.	Engages in effective oversight of others engaged in pastoral and leadership activities

## E. RELATIONSHIPS

### *Ordained ministers ...*

- are able to form and sustain healthy relationships with peers in the mixed economy of fresh and more traditional expressions of church.
- are able to handle and help resolve conflicts and disagreements, enabling growth through them.
- understand human flourishing in relationships and Christian pastoral care in a range of life circumstances and contexts
- and demonstrate good reflective practice in a wide range of pastoral and professional relationships.

*Ordained ministers are people who respect others, demonstrate empathy and honesty in their relationships, learning from them. They ...*

- are able to engage positively with those with whom they differ.
- are able to establish and evaluate appropriate professional boundaries in their ministerial practice and personal lives.
- understand and apply policies and best practice in safeguarding and their application in a variety of contexts.

*Deacons are able to form good relationships with people outwith the Church context. They ...*

- *are skilled in working with groups and in relating to secular agencies*
- *mobilise others effectively to meet needs in the local community*
- *can engage in advocacy in the public arena Incumbents ...*
- show skill and sensitivity in resolving issues of conflict within the church community.
- are able to supervise others in the conduct of pastoral relationships.

**CHECKLIST OF AREAS OF EXPERIENCE/EXPERTISE: RELATIONSHIPS**

**IME 4**

- Understanding of confidentiality
- Ministry with and to colleagues
- Dealing with critique and criticism
- Development of e-mail and social media etiquette and rhythms
- Understanding of relational dynamics of secular agencies and charitable groups

**IME 5-6**

- Consideration of personal boundaries and critical distance in ministry
- Awareness of sexual dynamics
- Knowledge of safeguarding policies
- Contact with secular agencies and charitable groups

**E. RELATIONSHIPS**

<b>Performance Evidence</b>	<b>Range</b>
Accounts from self, lay people such as Wardens, and Training Incumbent of the ability to build fruitful relationships.	A variety of settings including the church (at local, area and diocesan levels and ecumenically), the community, and schools.
Accounts from self and others of the ability to work through and help others to work through situations of disagreement.	Both inside and outside the church.
Accounts from self, the Training Incumbent and others of the ability to promote the corporate life of the church	Work with existing and new groups and with the whole range of church members regardless of age or background.
Accounts from self and others of the ability to exercise pastoral care of individuals and of the ability to maintain professional and safe boundaries.	Hospital visiting, care of the sick and dying, crisis visiting. Visiting in relation to pastoral offices. Developing good relationships with community bodies/groups e.g. schools
Account from self, key figure in support network and from colleagues supported that they are experienced as a supportive and constructively critical colleague	Training Incumbent, other colleagues, lay and ordained, and key relationships in wider community

## F. LEADERSHIP, COLLABORATION AND COMMUNITY

*Ordained ministers seek to model their servant leadership on the person of Christ. They ...*

- are able to participate in and lead communities, reflecting on, and being alert to, the use and abuse of power.
- are able to lead collaboratively and competently, working as an ordained person as a member of a team within a community

*Ordained ministers share leadership by actively looking for, recognising and nurturing the gifts of others. They ...*

- are able to use authority appropriately in ways that release, equip, enable and empower others, including colleagues, to fulfil their calling to mission and ministry from within a Christian community.
- are able to supervise and mentor others in a defined range of roles and responsibilities in mission and ministry.

*Incumbents ...*

- show skill and sensitivity in enabling the formation and flourishing of corporate life in the presence of diversity.
- are able to lead teams collaboratively in a variety of settings, including linked charges
- are able to facilitate change creatively and sensitively, exercising leadership with an entrepreneurial and forward looking approach.
- are able to supervise lay and ordained people in positions of responsibility in formal and informal settings of training and practice.

### **CHECKLIST OF AREAS OF EXPERIENCE/EXPERTISE: LEADERSHIP, COLLABORATION AND COMMUNITY**

#### **IME 4**

- Developing a leadership role and awareness of own preferred leadership style
- Developing understanding of partnership in ministry
- Counselling/listening skills and awareness of own limitations
- Time and diary management

#### **IME 5-6**

- Exercising a leadership role
- Collaboration with others; distinguishing between delegation and collaboration
- Dealing with conflict
- Developing lay ministry and leaders
- Working with ecumenical partners

## F. LEADERSHIP, COLLABORATION AND COMMUNITY

Performance Evidence	Range
Account from self of reflective process in relation to developing leadership in ministry and evidence from lay and ordained colleagues that they reflect effectively on ministerial styles, and their strengths and weaknesses.	Engagement in church ministerial review processes and in those initiated by self
Accounts from Training Incumbent, Wardens and Vestry and appropriate others of effective training, supervision and management of laity and (where possible) clergy.	Supervision and management of laity and junior clergy (where possible) in pastoral, educational, liturgical and nurturing roles. Supervision and management of laity and clergy (where possible) in pastoral, educational, liturgical and nurturing roles.
Accounts from self, Training Incumbent and others of effective developmental leadership within a collaborative setting.	Leadership within collaborative settings that involve the opportunity for development.
Accounts from those whose leadership and service had been enabled and from Training Incumbent.	Enables others in leadership and service, for example as leaders of house groups and nurture groups, as leaders of committees and task groups, as pastors, within the liturgy and within the community showing within themselves authority and leadership.
Account from Training Incumbent, Wardens and Vestry and others of leadership style as it encompasses authority and obedience, leadership and service.	Leadership that creates and maintains collaborative working within Church (e.g. leadership generally within the congregations(s), of committees, teams and working groups) and community.
Accounts from a person supervised by the Curate commenting on the level of guidance, support and development in role of the Curate.	Supervision of worship leaders, volunteers in the church. (Where possible supervision of employed staff).
An account of how personal commitment to Christ and discipleship is being shaped within the roles and expectations of leadership and oversight of others.	In the leadership and oversight of others within and beyond the church, including work in the wider community.
Account of a challenging ministerial judgement made in terms of the process undertaken, the decision made and the impact on self and on the leadership of the community.	In personal discipleship and public ministry within and beyond the church.

## G. VOCATION AND MINISTRY WITHIN THE SCOTTISH EPISCOPAL CHURCH

*Ordained ministers are firmly convinced of their calling to ordained ministry, realistic about its challenges, and continue to ask important questions about their role as deacon or priest in the church of God. They ...*

- are able to articulate their calling to discipleship and to ordained ministry as a deacon or priest within the Scottish Episcopal Church
- understand the sacrificial and corporate nature of their role in ministry and mission as a deacon or priest within the breadth and diversity of a mixed economy of traditional and fresh expressions of church.

*Ordained ministers are rooted in the traditions and practices of the Scottish Episcopal Church and share in the spiritual life of the communities they serve. They ...*

- are able to represent the church in public life and engage in partnerships across wider groups of charges, including, where possible, working with churches of different denominations and traditions and other faith communities and their leaders.

*Ordained ministers are accountable and obedient in exercising ordained ministry as a deacon or priest within the Scottish Episcopal Church. They ...*

- understand the legal, canonical and administrative responsibilities of those in public ministry.
- show developed skills as theologically reflective and reflexive practitioners in relatively unsupervised settings, exercising wise and discerning judgment.

*Deacons are alert to the potential and scope of the diaconate. They ...*

- are willing to use their gifts in the service of the Church beyond the local context.

*Incumbents are ready for, and open to, exercising a ministry of oversight and vision as priests in the church of God. They ...*

- take a lead role in working with partners, including, where possible, working with other faith leaders

### **CHECKLIST OF AREAS OF EXPERIENCE/EXPERTISE: VOCATION AND MINISTRY WITHIN THE SCOTTISH EPISCOPAL CHURCH**

#### **IME 4**

- Developing as a reflective practitioner through:
  - theological reflection on ministerial experience through regular supervision sessions
  - use of critical incident template;
  - journalling
  - attendance at Bishop's Reflection Group sessions

#### **IME 5-6**

- Continuing to develop as a reflective practitioner by using theological reflection in making decisions in relation to the life of the congregation: decision making, vision-casting, vestry.

## G. VOCATION AND MINISTRY WITHIN THE SCOTTISH EPISCOPAL CHURCH

Performance Evidence	Range
Reflection from candidate and Training Incumbent articulating the working out of God's calling to ordained ministry during the curacy.	Works out vocation to ordained ministry in church (province, diocese, charge), community and personal settings.
Account from Training Incumbent and others of their readiness to fulfil a calling to the role of the Incumbent, Assistant or Deacon.	A variety of Church and community settings.
Account from Training Incumbent, Wardens and others of the demonstration of the working understanding of legal and canonical responsibilities	Marriage regulations, health and safety regulations, Safeguarding procedures. In application to worship, buildings and grounds, statutory meetings and records, occasional offices etc.
Account from Training Incumbent, Wardens and others of the demonstration of the understanding of administrative responsibilities.	Communications, record keeping, filing, data protection, rota, cleaning and maintenance,
Account from Training Incumbent, Wardens and Vestry and others in Church leadership within the Charge of willingness to be properly accountable and accepting of the legitimate authority of others and of responsibility exercised in the Charge and local community.	Is responsive to the authority of the Incumbent and Vestry, the Bishop and Diocesan IME 4-6 Coordinators to whom authority is delegated by the Bishop.
Account by self or ecumenical partners of ecumenical working and understanding that shows respect for the beliefs and practices of others.	Work in partnership with ecumenical colleagues in local witness and ministry e.g. leading ecumenical worship, working together in joint projects
Accounts from self, Training Incumbent, and community members and professionals of taking a leading role in working as a church representative with other partners, networking with others to promote kingdom values, and acting as a Christian leader within the community.	Where opportunities present for public ministry e.g. civic services, Remembrance services organized by civic authorities, working with schools, residential homes, healthcare professionals and local government bodies, the voluntary sector and businesses.
Account of engagement with local leaders and members of other faith traditions and the impact that has had on self, them and others, and working in ways which show respect and understanding that build community.	Engagement with members of other faith traditions in locality, including interfaith forums.

Appendix 3.ii Working Agreement

**DIOCESE OF**

**Scottish Episcopal Church  
Working Agreement**

*for calendar year* \_\_\_\_\_

This agreement is made between the Reverend \_\_\_\_\_  
Rector of \_\_\_\_\_  
and Curate \_\_\_\_\_

in respect of the latter's ministry attached to the above charge and responsible to the above  
Training Incumbent

The agreement shall apply for the period \_\_\_\_\_

The agreement will be reviewed on \_\_\_\_\_

The expectation is that this curacy will not end before: \_\_\_\_\_

and will not continue beyond: \_\_\_\_\_

*Please fill in the boxes after discussing fully the topics above each box. One copy of the completed report is to be retained by the Curate, one by the Training Incumbent and one sent to the Bishop. Please expand the boxes as needed.*

**1. Pattern of private and public prayer**

- When will the Incumbent and Curate pray together?
- When not praying together, what pattern of public prayer is expected from the Curate?
- How might private prayer fit into this pattern?

**2. Primary components of the Curate's ministry**

- List the agreed primary components of the Curate's pastoral, missional and administrative involvement, their frequency and locus.
- Detail the pattern of attendance at and participation in worship; that is the expectations regarding attendance at public worship and those regarding participation – leading worship and preaching.
- Describe any oversight responsibilities (tasks and people)

*(This will be a substantial section of the Working Agreement)*

**3. Expectations regarding ministerial dress**

- Describe requirements of dress for public office.
- Describe requirements of dress for robing for services, and when attending worship in the charge and ecumenically

**4. Staff meetings**

- Detail the arrangements made for regular staff meetings: frequency of meetings, who else might be present
- Detail the expectations regarding attendance at Vestry meetings and other committees

**5. Supervision meetings**

- Details the arrangements for supervisory meetings: frequency of sessions and method of agenda-setting
- Describe the methods of theological reflection to be used

**6. 'Working hours', time off, holidays**

- Describe the pattern of 'working hours' through the week
- What day will the Curate have off? Does this include the evening before?
- If the day off is lost for a good reason (e.g. a funeral) how will time off be reclaimed?
- Describe the usual pattern of holidays and how block time off is agreed.
- Detail what level of availability is expected (use of answering machine, home for meetings, hospitality, departure time after Sunday services, etc.)
- Detail expectations regarding time keeping and punctuality

**7. Study, reading and preparation time**

- Noting that one study day per week (on average) is required to support the ongoing academic requirements of the curacy, describe how this will be taken, the content and hoped-for outcomes.
- In addition, note that time will be needed for preparation of worship, especially preaching and for ministerial tasks
- Describe how and when shared diary planning will be done

**8. Nurture of spiritual life**

- It is expected that the Curate will receive spiritual direction. Detail the time requirement for this.
- What time will be made for regular retreats?
- Will the charge make any contributions towards the cost of these?

**9. IME 4-6**

- Noting that attendance at the Diocesan provision for IME 4-6 is a requirement that takes priority in the diary, detail the expected dates of such attendance.
- It is good practice to require a Curate to attend training events provided for clergy in the diocese. Detail the expectations of attendance at diocesan/provincial training events.
- What is the expectation regarding conference attendance, either with the Training Incumbent or by the Curate alone. How is conference attendance funded?

**10. Out-of-pocket expenses of ministry including travel**

- Describe in general terms what out-of-pocket expenses might be claimed, and the system for doing so.
- Will the charge offer any other allowances, for books for example?

**11. Issues that require permission**

- Clarify that responding to invitations and taking initiatives might need permission from the incumbent – speaking, preaching, serving on external bodies.
- Detail how such permissions will be negotiated.

**12. Administrative support**

- Detail the level of administrative support and on-site working space available for the Curate.

**13. Confidentiality and matters relating to professional working**

- Include a statement about the boundaries around conversations between incumbent and Curate
- What values might you hope to foster for professional working?
- Detail how disagreement will best be handled

**14. Feedback**

- Detail how the Training Incumbent will ensure that the Curate is made aware of any inadequacy in his/her progress or standards of work, and the process for addressing that
- Detail similarly how the Curate can feed back any dissatisfaction to his/her Training Supervisor in a safe way.

**Date of Annual Review**

Date	IME 5	IME 6
------	-------	-------

We confirm that at a meeting on \_\_\_\_\_ we committed ourselves to striving for a productive, trusting and honest working relationship. We reached agreement on our roles and responsibilities as Curate and Training Incumbent in accordance with the above summary.

**Curate** \_\_\_\_\_

**Training Incumbent** \_\_\_\_\_

**Vestry Representative** \_\_\_\_\_

**Diocesan IME 4-6 Coordinator** \_\_\_\_\_

**Diocesan Bishop** \_\_\_\_\_

*Once signed this a copy of this agreement should be kept for reference by each party, and a further copy sent by the Training Incumbent to the Diocesan IME 4-6 Coordinator who will forward it to the Bishop and to SEI.*

## Appendix 3.iii: Ministry skills and task checklist

*This is included as an extra resource for considering the breadth and range of ministry covered – or not. Not everything on this list is necessary; it is another tool which may prove helpful to some.*

### **Personal Development**

Spirituality and prayer life: Daily Office, quiet time, prayer styles, Spiritual Director

Reflection on role and work

Awareness of own learning style

Awareness of need for good administrative skills

Continuing theological reflection/making connections to daily life and work of laity

Development of appropriate working rhythm, including time off, retreats etc.

Awareness of sexual dynamics in working relationships

Understanding of confidentiality

### **Conduct of Worship**

Requirements of Canon Law regarding worship

Familiarity with newly authorised services

Authorised Liturgies

Morning or Evening Prayer (sung)

Baptisms and weddings

Blessing after civil marriage

Thanksgiving for birth of a child

Funerals

Holy Week

All-age worship

Writing and planning special services

Reading, speaking and singing in church

Leading intercessions

Choosing music and liaison with musicians

Preparing the church; books for worship; the communion vessels

Practical awareness of traditions other than own (e.g. use of vestment, incense)

### **Preaching**

Main Sunday Eucharist

All-age worship

Youth services

Preparation of audio/visual aids

Weddings and Funerals

To non-regular churchgoers

### **Mission and Evangelism**

Awareness of local context, in particular the social profile

Developing theology, understanding and practice of mission

Knowledge/experience of new mission ideas

Ability to present the Gospel message to those with little or no church background

Experience of using one of the evangelism resources, e.g. Alpha. Emmaus etc.

Fresh Expressions – reading/experience

### **Educational/Nurture**

Awareness of current issues in society

Knowledge of how adults learn

Confirmation preparation - children and young people; adults

Communion before Confirmation

Teaching about prayer

Home Group leadership

Bible study leadership

Sunday School

School Assemblies

Involvement in a church youth group

### **Pastoral**

Baptism preparation/follow up

Emergency baptism in hospital

Death of babies: including stillbirth, abortion, miscarriage

Marriage preparation

Marriage requests e.g. from divorced people

Wedding blessings

Pastoral visiting - visiting the sick at home/hospital

Ministry to the sick and dying in hospital or at home

Healing services and anointing the sick

Funeral visiting

Bereavement care

Sudden death e.g. accident, suicide, major incident

Encountering the mentally ill

Ministry in an institutional setting e.g. prison, old people's home

Counselling/listening skills and awareness of own limitations

Blessing of objects, homes and people

## **Organisational**

Preparation for and chairing of meetings Paper/email management

Time management Presentation skills and publicity

The keeping of records

Long term planning & development

Goal/objective vision setting and evaluation

Writing magazine articles

Managing fees and expenses

Working with the media

Child Protection

Personal safety awareness

## **Ministry and Leadership**

Knowledge of own leadership style and ability to work in other ways

Work with lay/other clergy in developing ministry/mission

Church registers

Property matters and Canon 35

Legalities of worship including interfaith and ecumenical worship

Simple accounting and budgeting

Collaborative leadership - knowledge and experience

Work with Associate ministers

Work with lay ministry

Work with a Ministry Team

Working with volunteers

Dealing with conflict

## **Links with the wider church**

Awareness of Diocesan resources and policy

Involvement in Regional /Area Council

Links with other local Churches and Christian Councils, L.E.Ps.

Awareness of Provincial church structures

Awareness of worldwide Church

## Appendix 3.iv: Sermon evaluation feedback form

**Name of Preacher:**

**Date and Place of sermon:**

**Type of service or other context:**

1. What would you say was the main point of this sermon? (What was it about? What was its aim? (If unclear, please indicate this)
2. How would you rate the following (1= weak, 5= excellent):
  - o Delivery                    1      2      3      4      5
  - o Attention                1      2      3      4      5
  - o Length                    1      2      3      4      5
3. Please give any further reflections on
  - o Delivery (Could you hear sufficiently? Was the pace about right? Was there enough eye contact? Any helpful or unhelpful gestures? Did they hold your attention...?)
  - o Content (sermon length; use of story, humour & illustration; level of preparation; sufficient clarity of structure?)
  - o Context (Was the sermon appropriate for the occasion, and for the make-up of congregation?)
  - o Application (What impact did the sermon have on you? How did it relate to your everyday life? Were you inspired? encouraged? challenged to act? given cause to think?)
4. What were the main strengths of this sermon?
5. What one thing would you encourage the preacher to do differently another time?
6. What is the main thing you will take away from this sermon?
7. Any other constructive comments to support the preacher's development?

## Appendix 3.v: Worship leading feedback form

### Worship feedback form

<b>Date:</b>	<b>Setting:</b>
<b>Occasion:</b>	
Feedback from:	

Summary of the presumed aim and content of the Service.

Comments on content, structure, style of service and its suitability.

Comments on delivery, voice, mannerisms, pace etc.

Other supportive comments to aid the Curate's development

## Appendix 3.vi: Learning from a Ministry Event

*This form is designed to help systematic reflection upon the experience of ministry in order to help integrate learning and practice. It can be printed and used as it is, used as a template on your computer, or adapted as needed. Not all the questions will be relevant for every situation<sup>88</sup>.*

<b>The event:</b>	
Date:	Location:
Describe briefly what happened, including your own role and how you felt about the event and your role within it	
<b>What were the main issues/questions which this event raised for you?</b>	
<b>Building a thicker description of what happened:</b>	
Understanding the context:	
Understanding from the perspective of others involved or affected;	
Understanding using various disciplines (e.g. social sciences, psychology)	

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<sup>88</sup>This template is based on the model of 'Progressive Theological Reflection' outlined in Judith Thompson, *SCM Guide to Theological Reflection* (SCM 2008, p 55-56)

<b>Building a theological understanding</b>
What insights from the faith tradition (e.g. from scripture, theological writing, historic tradition) help to build a theological understanding of what happened?
<b>Now return to the original situation</b>
How do these perspectives change your initial understanding of the situation?
<b>Finally...</b>
What are the implications for future practice? What specifically might you do differently in a similar situation, and why? Is there anything you need to do now?
<b>Any other questions to note or follow up?</b>
<b>Books / resources to note</b>
<b>This relates to the following Learning Outcomes:</b>

## Appendix 3.vii: Pastoral Visiting Record Form

Date of visit:

Initials of parishioner/patient: Location:

Length of visit:

### **Known facts**

*Include all known details about the person being visited, the situation and the occasion of the visit*

### **Background observations and assumptions**

*Include plans and expectations for the visit, what was observed and felt as it began, the appearance of the person visited, etc.*

### **Summary of visit**

*Record an overview of the visit including thoughts and feelings, observations and intuitions*

## **ANALYSIS**

### **Person**

*Record here what you think the person was feeling and thinking during the visit and how he or she is feeling as a result of the visit*

### **Visitor**

*Record what was happening to you during the visit, where you think you succeeded and/or failed in your offering of pastoral care*

### **Theological reflection**

*Record here the implicit and explicit beliefs and meanings expressed. Note any themes or associations with biblical or theological ideas. Ponder any ethical issues or dilemmas.*

### **Future Aims**

*Record what you hope or intend to do next.*

### **Why this visit?**

*Record here why you chose to write up this conversation and what you feel and think about it now*

## 4. SKILLS

### Appendix 4.i: Evidence-based reporting and feedback

The goal of an evidence-based approach is to provide all parties in the learning partnership with as accurate a picture as possible of the Curate's development. In particular, because learning is a process that takes place over time, each evidence-based report will provide feedback for the Curate about what to focus on particularly in the next period. Curate, Training Incumbent and Lay Support Groups should be looking regularly at the Formational Outcomes (Appendix 3.i) and amassing evidence of how these goals are being achieved; this should involve the citing of hard fact rather than of anecdotal evidence. By garnering such evidence and discussing it with the Curate, Training Incumbent and Lay Support Group members alike can help the Curate reflect upon areas of expertise, note those aspects of ministry which they are avoiding/finding difficult and set goals for the next period of engagement.

The giving of feedback is likewise an art; feedback too often manifests itself as either unreflective criticism or generalized praise, a blanket summary statement of how good someone is without explaining what in particular they are good at and what is good about it. Praise consists of unspecified laudatory comments directed towards persons *qua* persons; that is, towards their attributes or their identity rather than their behaviour or performance. For example, 'you're a genius with languages' or 'you're such a gifted singer'.

Feedback, in contrast, consists of statements about the nature of what someone did. It is directed not towards a person's attributes but toward their actions. For instance, 'I admire the work you did to get 98% on that Greek test' or 'your singing makes me feel so serene' are examples of feedback rather than praise. Feedback can be just as positive and approving; it simply shifts the focus away from a person's identity and onto the effort they put into the task. Feedback is an objective message about behaviour or activity, recognising and reinforcing something well done or offering suggestions about how to do something better. In giving feedback

- be accurate and specific. It is much easier to do something with specific feedback than with generalisations. For example, 'you tend to drop your voice at the end of a sentence' is better than 'I find you difficult to hear'.
- offer it on the things which the person has the power to change. 'I find your tendency to flick your hair during preaching distracting' could be helpful. 'I really don't like your accent' is not.
- be sensitive. It is helpful to spell things out in full using 'I' language. 'I felt lost and rushed and found I was distracted during the first prayer. It might be helpful to slow down a bit', rather than 'you prayed too fast in the first prayer'.
- remember that it is as creative for people to receive feedback about their strengths as it is to receive it about weakness, since it enables them to affirm what they have and build upon it with confidence. All feedback should include affirmation of strengths.<sup>9</sup>

In short, feedback should be focussed on behaviour not personality, evidence not assumption, description not value judgments, specifics not generalities

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<sup>9</sup> Adapted from *Becoming the Pastor You Hope to Be; four practices for improving ministry* Barbara Blodgett Alban Institute (2011) and *Church of Scotland Supervisors' Handbook* (2015)

## Appendix 4.ii: Reflective practice in supervision

Supervision sessions are not administrative meetings for the purpose of setting diary dates and planning services; they are for engaging in reflective practice. The task of the Training Incumbent is to help the Curate/Lay Reader to ask questions arising from her/his experience of ministry in such a way that his/her deepening theological understanding is a personal process and not just a deposit received from another.

Imagine the kind of discussion that took place when Jesus gathered His disciples together after sending them out to proclaim the kingdom of God. He listens to what's happened and continues to guide them in the light of those experiences.<sup>10,10</sup>

*Jesus called the twelve together and gave them power and authority over all demons and to cure diseases, and He sent them out to proclaim the kingdom of God and to heal. He said to them, 'Take nothing for your journey, no staff, nor bag, nor bread, nor money .....*

*They departed and went through the villages, bringing the good news and curing diseases everywhere .....* On their return the apostles told Jesus all they had done. **He took them with Him and withdrew privately to a city called Bethsaida.** (Luke 9)

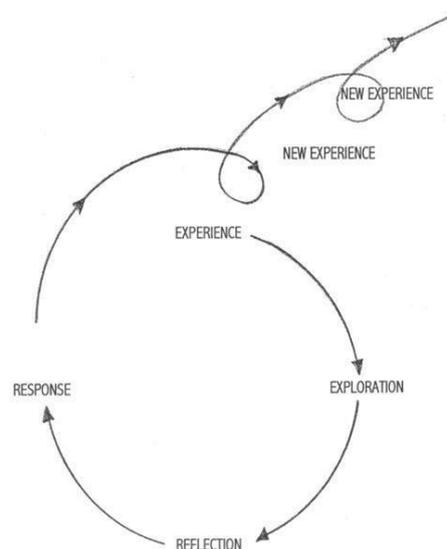
That is what you are trying to do in supervision sessions. They are meetings in which Supervisor and Lay Reader reflect together on what has been noticed and experienced, and the Lay Reader learns how to allow his/her experience to question the theological tradition and the tradition to confront his/her experience. In other words, the Lay Reader continues to develop that method of theological enquiry which undergirded IME studies. and which fosters resilience, sustains practitioners in ministry and enables them to respond creatively to change.

In their IME 1-3, Curates/Lay Reader candidates were taught to offer a non-judgemental narration of an **experience**: *recall the who, what, where, when and how of the event*;

to **explore** it so as to identify the heart of the matter: what issue, question or quandary does the experience raise for you?

to **reflect** upon it theologically by structuring a correlation: *Does the theological discourse bring new insights to the experience? Does the experience bring new insights to the theological discourse?*

and finally to **respond** by identifying new learnings and calls to action: *How will you grow from this experience? What might you do differently next time?*



<sup>10</sup> For more about being 'a provocative mentor' see 'Asking questions afterwards' Geoff Maugham *British Journal of Theological Education* 14. 2 (2004) 127-135

Training Incumbents need to enable the Curate/Lay Reader to engage in this theological work him/herself, rather than offering quick-fix answers to ministerial issues. The 'pro forma for Critical Incident journalling' below is one way of engaging in reflection upon ministerial experience. The comparative length of each section is delineated by the relative size of the boxes.

**Narrate the experience**

**Identify the heart of the matter**

**Outline the resulting theological reflection**

**Identify new learning or avenues for further development**

The behaviour of **the Training Incumbent** is also crucial. Pastoral supervision is a method of doing and reflecting upon ministry in which a supervisor and supervisee covenant together to reflect critically upon their ministry as a way of growing in self-awareness, professional competence, theological understanding and Christian commitment. This means that how the Training Incumbent models ministry is of supreme importance. Throughout all contact with the Lay Reader it is vital to show a continuing ability to learn, to be challenged and to engage effectively with the excitement of ministry; to show commitment for the task and for the congregation; and to demonstrate the enrichment and engagement that the work of ministry brings. The Lay Reader should see someone who is still learning, and who is prepared to respond, adapt to change and think theologically about practice. It will require energy, effort and enthusiasm.

This also means learning the art of giving feedback as discussed on page 81 and using questions to facilitate learning from experience. Guiding Curates through a set of questions helps them to gain an overall appreciation of their learning, to express it and own it, and to gain confidence in their ability to devise a process for tackling something else. You will also signal that you are genuinely interested in their development, and not just in another pair of hands to help in the parish. The overall message is to treat your Curate as an adult who is highly motivated, very committed, self-directed and self-organizing. Some good questions, to structure reflection and avoid a haphazard approach which will depend on what is remembered in the moment, might be:

- What did you set out to achieve?
- What problems did you encounter?
- How did you overcome them?
- How satisfied are you with the results?
- What questions are you left with?
- What theological sense do you make of this?
- Where is God in this?

Perhaps not this: 'Did you get it right?'

Instead maybe: 'How are you growing because of this?'

A supervisor can best help by guiding a Curate through a sequence of questions like these, and by asking follow-up questions to help the Curate probe deeper into the experience. It is a quality of good supervisors that they know the questions to ask – and also when to keep silent. These skills cannot really be taught; they come out of the wisdom acquired by lived experience and from the maturity that has inculcated habits of reflection in supervisors.

The skill that *can* be learnt is familiarity with a range of questions to be deployed when occasion demands. Perhaps, as with spiritual growth, you can't take people further than you have gone yourself, and your own past and present experience of supervision will be useful here.

Extracted from: K. Lamdin and D. Tilley, *Supporting New Ministers in the Local Church* SPCK (2007).

## Appendix 4.iii: Working collaboratively

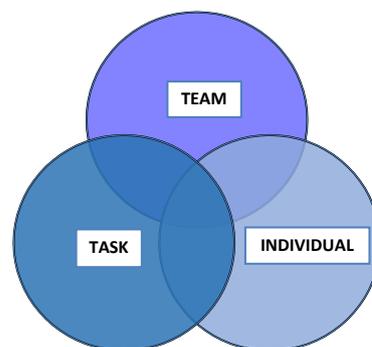
Curate and Training Incumbent will need to work hard - from the initial discussion which leads to the drawing up of the Working Agreement right through the IME 4-6 years and beyond – to apply good practice in the area of collaborative working. The tools offered in this Handbook will help towards that; the establishment of annual goals and the use of objective criteria for evaluation and evidence-based reporting all encourage a culture of mature reflection upon gifts and shortcomings. Judgements become depersonalised, without blame or shame; ongoing appraisal of strengths and weaknesses becomes the norm.

But these frameworks notwithstanding, good team working *has to be worked at*. As is well known, all teams have three overlapping areas of need:

those of **Individuals**, that is, paying attention to physical, psychological, social, emotional and spiritual needs

those of the **Team**, that is the maintenance need to create and develop a cohesive group

those imposed by the **Task**, that is getting the job done



**Individuals** (must know their role, responsibility, authority, accountability, value and worth)

- need to belong
- need to contribute
- need for status
- need for power

- need for dependency
- need for freedom
- need for recognition of problems

A team will function better when the needs of its members are attended to and each individual is able to contribute freely, unhindered by personal distress.

**Task** (achieving objectives)

- need to get a job done
- need for a worthwhile goal
- need for a clear goal

- need for agreement about the goal
- need for a plan to achieve the goal
- need to be able to recognize when the goal has been achieved

**Team** (holding together)

- need for group to stick together until the job is done
- need to improve understanding
- need to aid cooperation between members

- need to obtain clarity
- need for members to support each other
- need for identification of skills
- need for good communication

Building a smoothly functioning team will necessitate considering the three areas outlined in the three-circle model: the task or skills needed to accomplish the task, the needs and development of individuals and the development of the team as a corporate unit. Clarifying aims, allocating and delegating roles and responsibilities, good diary management and forward work-planning, timed implementation and intentional evaluation will all form part of the task-focused areas of team life.

**Clarity about roles and responsibilities** is vital; ‘role creep’, where an individual is seeking to perform too many different roles, must be avoided. The Working Agreement should militate against this

danger. A healthy team comprises players who restrict their activities so as to avoid diminishing the role of others of others, but who play their own role with distinction. Seeing where people fit and ensuring they are working where they flourish is a key responsibility of Training Incumbents.

Another way in which to help teams work well together is for members to come to an **appreciation of the different kinds of personalities** which make up that team. Different personalities contribute differently to the process of working together, and for harmonious work it is necessary to understand where your fellow members 'are coming from' and why. There are many different tools on the market to aid such enquiries, from the Myers-Briggs Type Indicator, the Belbin Team Role Analysis, Honey and Mumford's Learning Styles Questionnaire, Gilmore and Fraleigh's 'Style Profile for Communication at Work' and the Enneagram. The use of such tools can contribute to the development of individual confidence and security, and of harmonious team-working.

**Learning the art of delegation** is vital. It is not enough to simply 'dump' tasks on people - clear instructions around expectations need to be given and where necessary, training, support and encouragement made available. The 'tripod of work' (right) is a helpful tool in this regard. It emerged from listening to people talk about the conditions in which they felt they could be most effective as individuals and working together in teams.

*Tasking*

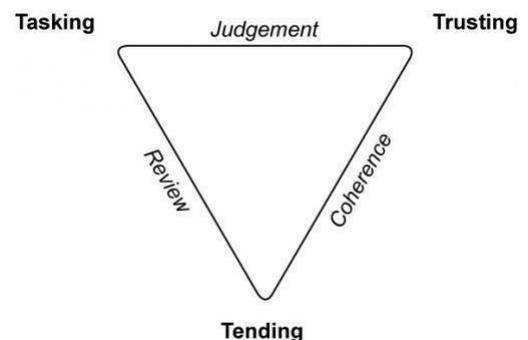
- sharing intention
- agreeing objectives
- agreeing a completion time.

*Trusting*

- entrusting people with the purposes of the organization
- trusting them to use their judgement in carrying out work for which they are accountable
- evaluating and developing individual capabilities
- making sure that no-one is either under- or overwhelmed by the challenges of their work.

*Tending*

- monitoring processes and systems
- communicating the vision for the work so that Lay Reader and others in the team have a context for their work, their initiatives and their judgement
- procedures agreed beforehand that will be used if there are unresolved differences of view.



**Good communication** is likewise essential. Within any team it is essential to find ways of communication that are effective and that connect with every team member. Many teams use e-mail to share information, but care should be taken that all involved are on e-mail and check it regularly otherwise some may feel that they hear everything later than everyone else or not at all. It is recommended that e-mails, text messages and letters be used for information purposes only; contentious issues should be handled face-to-face.

Face-to-face team meetings are essential for a variety of reasons, but must be utilized as effectively as possible so that members feel that the investment of their time and energy is worthwhile. This

can particularly be an issue when some in the team are in paid posts and others are doing demanding full-time jobs on top of their voluntary ministry. Having spent a whole day in the workplace, it can be frustrating to come to an unfocused and unproductive team meeting.

The Training Incumbent needs to ensure that communication is fair and democratic. If one person in the team always receives information second-hand they can feel excluded or unvalued. Similarly, situations can arise where it feels as if the team leader has an 'in-crowd' with whom they discuss important issues prior to the actual team meeting; this is especially important to manage well when there are two or more fulltime members in the team and the others are part-time or volunteer members.

Not all meetings need to be business-orientated, however; providing opportunities for team members to spend time together in other ways create a sense of **fellowship and cohesion** within the team. Spending time in corporate prayer, team worship or Bible study, in team-building activities, on Away-Days, studying a book together or watching a film can all assist in engendering a sense of cohesion and mutuality. To do this well, however, involves paying attention to people's availability and identifying meeting times and places which work for all concerned, not just the full-time/stipended members.

Never underestimate **the importance of attitude** in growing teams; simple things like not taking people for granted, treating people with respect and expressing appreciation and thanks may seem obvious but are often forgotten in the busyness of church and organizational life.

## Appendix 4.iv: Managing teams

Being assigned a Curate means that the Training Incumbent needs to be able to model what it is to manage a ministry team and to be a collaborative leader. There is a fallacy that being collaborative exempts one from exercising leadership; far from it. Working collaboratively requires the Training Incumbent to exercise developed leadership skills. Any attempt to work in a more egalitarian way will result in a 'shadow' leader emerging who arrogates to him/herself the role of leader without this being properly acknowledged; this can create tensions and dissatisfaction for those in the team, as well as confusion for those on the outside.

One of the key questions to ask about leadership in collaborative ministry is whether we lead in our natural style or lead in the way that is most appropriate for the situation or team. Leadership can make or break teams. Broadly there is a spectrum of leadership between laissez-faire and autocratic, as explored below:

**Laissez-faire.** In laissez faire leadership the leader functions more as a peer and has little authority. This style can work with a lightly motivated team who like to be quite autonomous. However, it can lead to confusion on the part of team members as they are offered little support and there is little structure. They may feel there is a lack of identity or purpose and feel a little insecure or frustrated.

**Democratic.** Democratic leadership is exercised by people who seek to be inclusive and develop a team which feels empowered. They share decision-making and encourage a degree of independence in their team. For many people this will result in commitment, motivation and a sense of purpose. A possible danger is that too much participation encourages power plays or a tendency to make popular decisions that may not be right.

**Charismatic.** Charismatic leaders often rely on their personality to make things happen. There may be little structure and some team members may feel insecure, not knowing what is expected of them, or unclear about a vision which can keep changing. A danger of this style is subgroups and feelings of inclusion and exclusion depending on a team member's relationship with the leader.

**Benevolent.** Benevolent leaders tend to provide a clear structure and operate with clear lines of accountability. It can feel paternalistic to more independent team members and encourage dependence on the leader in others. It is an approach that can feel comfortable in a church setting because it has a family feel; however, it may not function as efficiently as it could do because of the desire to keep everyone happy.

**Autocratic.** Autocratic leaders control the group, tend to issue orders and believe that any questioning of them is not appropriate behaviour. The leader resists participation and is often unaccountable. It is a way of leading that is an antithesis of collaborative ministry as it discourages people from taking responsibility for themselves and suppresses creativity and initiative-taking.

In team-building, different styles will be required at different times. Organizational culture is likely to influence how people lead and everyone will develop preferred styles and methods. Part of the art of effective team leadership is knowing when and how to adopt different but appropriate approaches. While a facilitative approach in collaborative work is preferable, it is important to recognize that at times we will need to be more directive. Challenging discrimination, bullying, gossip or other unacceptable behaviour will call for an authoritarian response, as will concerns relating to health and safety, and child protection. Leaders may also need to be directive in establishing and maintaining boundaries within the team, particularly in the 'forming' stage and conflict situations, when individuals often need direction and support.

Leaders are likely to be the people who establish and have power to challenge and change the team's norms and culture. Who we are in this regard is as important as what we do. If we are competitive and ambitious we will probably create an individualistic, competitive team culture. Conversely, if we encourage, empower and celebrate the achievements of others, a co-operative culture should be engendered. In collaborative ministry, leading by example is paramount. Those who do not model what they ask of others quickly lose the respect of their teams. In this respect, self-awareness and integrity are key personal qualities for those in leadership. Similarly, an ability to trust and a sense of being trustworthy is important in establishing a sense of security. Having vision and an ability to inspire, motivate and encourage others is essential if the team is to progress and achieve.

In reflecting on the approach to leadership in collaborative ministry, Rob Warren has identified five key movements away from traditional practice:

- being a conductor rather than a director; building on the gifts within the church rather than on those of the minister
- becoming a facilitator rather than a provider; enabling people to do for themselves rather than adopting a client mode
- permission-giver rather than permission-withholder; allowing others to shape and initiate
- steering rather than rowing; causing everything to be done as opposed to doing everything
- being a person rather than a parson; being human is a reflection of the incarnate Christ and being open and vulnerable contributes to this (Board of Mission, 1995, pps 25-6).

(The values are perhaps more widely accepted than when first written but there still needs to be a shift in the views of some laity who approach church with a consumer mentality: 'we pay them, so why should we do it?')

Building shared understandings of leadership is an essential early step in developing more collaborative styles of ministry. Perhaps the first step as a leader is to help people develop a sense of belonging and ownership of the concept and team. To belong means to feel included and participate actively, which enhances a sense of self and brings out the best which in turn engenders a willingness to give to the group.

Having a clear sense of direction is vital. In ministry, contexts aims and objectives are often tacit - leaders may have a sense of what they want to see, but this may not be formulated in ways that can be understood and communicated. For effective collaborative working, everyone within the team must have a clear understanding of what they are seeking to achieve. We should not assume that this is obvious; it must be articulated, and articulated in ways that are both understandable and memorable. This might include discussing and reviewing aims regularly, pinning them up on a wall and using them as a focus for prayer and evaluation.

Aims should be set in the context of the core purpose and vision enable team members to see the 'big picture'. They should be achievable but not too easily achievable, having an element of challenge within them. This will serve as a motivating factor to those involved. Clear, challenging aims tend to generate enthusiasm and energy.

Even where Training Incumbent and Curate form a team of only two staff, familiar tools and models of team development can give guidance and insight. John Adair's three interlocking circles of task, group, and individuals help to keep the balance between three key aspects: the task to be achieved, the working dynamic of the team, and the situations and (often hidden) needs of the team members. (For more on Adair, see <http://tinyurl.com/llqo7e>)

Tuckman's stages of team development – forming, storming, norming, performing – offer a reminder that teams do not happen overnight. Some teams (particularly in a Christian context) may never develop beyond the superficial, because they avoid the frustrations and/or conflicts that mark the 'storming' stage. (For more on Tuckman, see <http://tinyurl.com/3jcg3>)

The relationship between Training Incumbent and Curate is probably the single most important factor in the curacy. Both should invest heavily in the relationship (for example, by seeking opportunities for shared learning). However, it is at the same time an extraordinarily complex relationship: both personal and professional, with power balanced heavily towards the Training Incumbent as both manager and supervisor. Mutual friendship may well develop between two colleagues, but this must not be assumed, nor is it actually essential to a good working relationship, in the ways that trust and respect are.

Difficulties can arise when the professional relationship is used to fulfil social needs of either party, and the expectation of friendship can be oppressive and inappropriate. Neither party can require the other to be available constantly, but Curates are entitled to regular occasions when they may claim the undivided attention of their incumbent, for the purpose of planning, supervision and support.

## Further Reading

### **General**

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