

## Periodic External Review Report

### Scottish Episcopal Institute

January – February 2020



THE CHURCH  
OF ENGLAND

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## GLOSSARY

|         |  |
|---------|--|
| ASE     | Annual Self Evaluation   |
| IME 1-3 | Initial 3 years of training pre-ordination/licensing (= IMEI in the Church of England) |
| IME 4-6 | Curacy or equivalent (IME2 in the Church of England)                                   |
| PER     | Periodic External Review   |
| SCONUL  | Society of College, National and University Libraries                                  |
| SEC     | Scottish Episcopal Church  |
| SEI     | Scottish Episcopal Institute   |
| TEI     | Theological Education Institution  |
| URC     | United Reformed Church   |

## **LIST OF REVIEWERS**

**Dr Sally Buck**, Senior Reviewer; Warden of Lay Ministry, Church of England Diocese of Lincoln

**Rt Revd Dr Brian Smith**, formerly Bishop of Edinburgh, Scottish Episcopal Church

**Revd Dr Kevin Francis**, Rector of St Bride's Episcopal Church, Glasgow; honorary Anglican Chaplain to Glasgow University.

**Revd Dr Jack Dyce**, Emeritus Research Professor and former Principal, Scottish United Reformed and Congregational College.

## THE PERIODIC EXTERNAL REVIEW FRAMEWORK

For ministerial training institutions that offer the church's Durham University-validated Common Awards programmes (as most do), Periodic External Review is a joint process that meets the quality assurance needs both of the sponsoring churches and of Durham University, and enables the church to conduct an external quality check of each TEI against national standards and expectations for ministerial training and formation.

The reviewers represent both church and university and may produce a single co-owned report or, as with the present review, there may be two separate reports.

On behalf of the sponsoring churches, review teams are asked to assess the fitness for purpose of the training institution for preparing candidates for ordained and licensed ministry and to make recommendations for the enhancement of the life and work of the institution. Within the structures of the Church of England, reports are been prepared for the House of Bishops acting through the Ministry Council. The present review is undertaken at the request of the Scottish Episcopal Church and Institute.

For Durham University, the PER process is the university's mechanism for gathering and evaluating information from multiple sources to inform decision-making on: (i) renewal of the Common Awards partnerships with approved Theological Education Institutions (TEIs); (ii) revalidation of Common Awards programmes that have been approved for delivery within TEIs. Durham's report on these matters and addressing teaching and learning infrastructure and delivery will be produced in due course.

### *Recommendations and Commendations*

PER reports include Recommendations which are either developmental, naming issues that the reviewers consider the TEI needs to address, or may urge the enhancement of practice that is already good. They also include Commendations, naming instances of good practice that the reviewers specially wish to highlight. The reviewers' assessment of the TEI is expressed as much through the balance of Recommendations and Commendations in their report as through its criterion-based judgements.

### *Criterion-based judgements*

Reviewers are asked to use the following outcomes with regard to the overall report and individual criteria:

#### **Confidence**

Overall outcome: commendations and a number of recommendations, none of which question the generally high standards found in the review.

Criterion level: aspects of an institution's life which show good or best practice.

#### **Confidence with qualifications**

Overall outcome: likely to include commendations as well as a number of recommendations, including one or more of substance that questions the generally acceptable standards found in the review and which can be rectified or substantially addressed by the institution in the coming 12 months.

Criterion level: aspects of an institution's life which show either (a) at least satisfactory practice but with some parts which are not satisfactory or (b) some unsatisfactory practice but where the institution has the capacity to address the issues within 12 months.

**No confidence**

Overall outcome: A number of recommendations, including one or more of substance which raise significant questions about the standards found in the review and the capacity of the institution to rectify or substantially address these in the coming 12 months.

Criterion level: aspects of an institution's life which show either (a) generally not satisfactory practice or (b) some unsatisfactory practice where it is not evident that the institution can rectify the issues within the coming 12 months.

# REPORT OF THE PERIODIC EXTERNAL REVIEW OF THE SCOTTISH EPISCOPAL INSTITUTE

**January – February 2020**

## **SUMMARY**

### **Introduction**

The background to this Periodic External Review is of a training institute that has undergone significant change in the past few years. The movement from the difficult days of the ending of TISEC (as the training institution in the Scottish Episcopal Church was previously known) to a strong and unified community of staff and students with a confident management structure and clear desire to grow, reflect and learn, has taken much hard work and commitment on the part of many people.

SEI trains candidates for authorised Lay Ministry (Lay Readers), and ordinands (vocational deacons, assistant priests and incumbent status priests) from the Scottish Episcopal Church, and also candidates for the Ministry of Word and Sacraments from the United Reformed Church who are not studying through a Scottish University.

The student cohort in 2019-20 includes 2 URC candidates and 5 SEC incumbent status candidates (4 women, 1 man) of whom 4 (3 women, 1 man) are between the ages of 20 and 30 and studying on the mixed mode track. 4 women and 3 men are training as SEC assistant priests. Lay Reader candidates number 4; 1 man and 3 women.

Candidates can come from all seven dioceses of the Scottish Episcopal Church. They meet together as a residential community for 5 weekends a year and a week-long Orientation Week in the autumn. For these events St Mary's Monastery, Kinnoull Hill is the base. Between the residential weekends, students access weekly lectures and seminars either in person in Edinburgh at the General Synod Office or remotely by Big Blue Button on Wednesday evenings.

SEI reports to the Institute Council, its governing body. The Institute Council in turn reports to the Standing Committee of the General Synod. SEI is directly funded and supported by General Synod Office of the SEC through a budget administered by the Institute Council under the SEC's Standing Committee.

There are currently four full-time members of SEI staff: Mrs Linda Harrison is SEI's Administrator, Librarian and Protection of Vulnerable Groups Co-ordinator. Revd Dr Michael Hull is SEI's Director of Studies and Biblical Studies Tutor. Rev Dr Richard Tiplady has more recently joined the staff team. He is SEI's Director of Mixed Mode Training and Ministry and Mission Tutor. Revd Canon Dr Anne Tomlinson is SEI's Principal and the Reflective Practice Tutor. In addition to the four full-time staff the Revd Canon Graham Taylor, Rector of the congregation of St John the Baptist, Perth is the SEI's Chaplain.

SEI provides three years of formation as the norm for all candidates, even those who come with theological degrees, significant life and/or ministerial experiences, believing that with formation at the heart of the course, candidates are in that way better prepared to serve as Lay Readers, Vocational Deacons, Assistant Priests and Incumbents.

There are two categories of student; full-time or part time. Full-time students either study for a theology degree through one of the Scottish Universities alongside their formational studies, or follow the Mixed Mode programme. Part-time students receive their degree or diploma through SEI, validated by Common Awards (Durham University). SEI has recently petitioned Common Awards to add a Master's degree to its programmes of study.

A recent change in practice has seen SEI admit candidates every year for all programmes of study and authorised ministries. This change, from the prior practice of admitting most candidates on an every-other-year basis, has been made in order to preclude undue delay for candidates' entry.

All SEC part-time Common Awards students are fully funded by the Church. Students from denominations other than the SEC pay an annual fee of (currently) £5,995. All students are paired with a locally-based Diocesan Advisor whom they are recommended to meet monthly through the academic year. Students also attend regular meetings through the year of the Bishop's Reflection Group led by the Bishop of the Diocese in which the student is currently residing. Each student is part of a Small Group led by a Senior Student.

All students are involved in a placement every year, which, depending on the year of study will involve workplace chaplaincy, mission agency, social care agency, a charge or a chaplaincy. Final Year students have a year-long congregational placement looking specifically at models of pastoral care and leadership. At the end of the academic year, each student undergoes evaluation of their formational development through the year by means of an Appraisal Conference chaired by the Principal or the Director of Studies.

Because SEI is a training Institute that operates under the overall governance of the Scottish Episcopal Church and not a separate institution as is the case with many English TEs, some of the recommendations made in this report speak to that relationship and not solely to the activity of SEI.

### ***Earlier review and validation***

The SEC's predecessor body, the Theological Institute for the Scottish Episcopal Church (TISEC), by its own choice and that of the SEC, last underwent church inspection (as Periodic External Review was previously known) in September-December 2012 and the inspection report was published in February 2013. While it found strengths to commend, notably in the academic relationship with TISEC's then partner university York St John, the quality and range of corporate worship and the quality of corporate student life, the review team made significant recommendations around strategic governance and reshaping the way the provincial and diocesan-held elements of training were held together with a view to clearer lines of accountability and practical support and an improved student experience.

In taking those recommendations forward the SEC commissioned its own review of TISEC and its training. The reshaped ministerial formation enterprise that is now the Scottish Episcopal Institute is the outcome of decisions that followed that review.

Since 2014, SEI has offered programmes from the Durham University-validated Common Awards suite used by the majority of ministerial training institutions in the Church of England and by some partner churches. The Durham Common Awards team's separate report will comment further on those programmes and their delivery.

As we note above and at section B1, the SEI also has good working relationships with the Scottish Universities, whose degrees are taken by some of its full-time students.

### **Periodic External Review process and evidence**

The Senior Reviewer met the SEI principal in September 2019 to outline the purpose and scope of the Review, for scene setting and to respond to questions. The Review visits took place on 24-26 January 2020 (SEC/Ministry Team reviewers) and 21 February 2020 (Durham-led Common Awards programme review).

During the 21 February visit, the Durham review team met with key members of senior management staff, teaching and other staff, and student representatives from different facets of the TEI. Both on 21 February and during its January visit SEC/Ministry Team reviewers also met staff and students, some individually and some in groups, as well as chaplaincy representatives, context-supervisors and the Provincial Director of Ordinands. The also attended daily worship and sat in on lectures and seminars, and joined students and staff for meals. Meetings took place at the SEI offices in Edinburgh and (in January) at Kinnoull in Perth during a residential weekend for students. A range of stakeholders was consulted and written or oral communications were received from (among others) a number of Bishops, training incumbents and former students.

The SEI provided full documentation to the reviewers in advance, including: a. a self-evaluation document; b. programme regulations; c. module overview tables; d. curriculum mapping documents; e. external examiner reports; f. annual self-evaluation reports; g. statistical data; h. previous validation and inspection reports; i. committee minutes. The review team also had access to Common Awards documentation.

The PER reviewers were made very welcome by the SEI, staff and students alike. We would like to thank all those involved in preparation for the review, for providing information, co-ordinating meetings and for their warm hospitality throughout.

### **Summary of outcomes**

Our conclusion is that the Scottish Episcopal Institute continues to provide an appropriate environment for ministerial formation and is fit for purpose for preparing candidates for ordained and licensed ministry within the Scottish Episcopal Church. We say this in respect of the SEI’s teaching and learning, its worship and spirituality, its staff team and leadership, its community life and its contextual learning opportunities. There are many areas of excellence in this provision and appropriate commendations are made. Recommendations are made that we hope will enhance current provision and, if addressed in partnership with the wider SEC, enable the church’s needs and aspirations to be still more fully met.

The Report is written in relation to the PER Criteria outlined in the September 2019 edition of the Quality Assurance and Enhancement in Ministerial Formation Handbook.

| <b>CRITERIA</b>             | <b>OUTCOME</b>                 |
|-----------------------------|--------------------------------|
| A Formational aims          | Confidence                     |
| B Formational context       | Confidence with Qualifications |
| C Leadership and management | Confidence                     |
| D Student outcomes          | Confidence                     |
| <b>Overall Outcome</b>      | <b>Confidence</b>              |

## FULL REPORT

### SECTION A: FORMATIONAL AIMS

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

1. The SEI's own website, integrated into that of the Scottish Episcopal Church, clearly states its formational aims in its first paragraph which speaks of "shaping vibrant missional ministers for today's world. It encourages an ethos of ongoing learning for all involved in ministry, both through its oversight of Continuing Ministerial Development and in the encouragement and resourcing of lifelong enquiry in a learning church".
2. This clarity of communication continues in SEI's Field Education handbook and was reflected in the level of understanding reviewers observed in both the meeting of the Council and during conversation with council members, staff and students alike.
3. Observation of the Council meeting, conversations with bishops and other council members along with interviews of core staff and students past and present gave reviewers insights into the way in which all involved in SEI are able to see the academic, personal, faith and ministerial formation as one and the same. This understanding is, in great part, due to the principal's carefully worked and worded documents and ongoing communication through the newsletter.
4. The response by the Institute to question 1A, in Appendix A of the document "Quality Assurance and Enhancement in Ministerial Formation. September 2019", speaks of the telos of the formational programme as being "Conformity to Christ". It goes on to stress the virtue of 'wisdom' over 'cleverness', and the importance of the development of skills in 'practical wisdom'. In addition, the IME 1-3 Handbook [Page 1-2] lists the skill-set with which the training programme works. It talks of people being formed as:
  - a) Missional Leaders
  - b) People of Prayer
  - c) Collaborative Workers
  - d) Reflective Practitioners
  - e) Pastors
  - f) Disciples of character
  - g) Episcopalians/Anglicans
  - h) Lifelong learners
5. The IME 1-3 Handbook also speaks of a theology of Mission underpinning and informing the course. While the phrase "Conformity to Christ" shapes the goals of the course in terms of an individual's personal development; it is the concept of Mission, and a theology of Mission that undergirds the understanding of the Church into which individuals will exercise ministry. Thus, these two notions, "Conformity to Christ" and "Mission" are at the heart of the review of the formational tasks of the Institute. Reviewers could not but be conscious that talk of "Conformity to Christ" has been interpreted in different ways in the course of Christian history. The contemplative religious, and the angry fighter for political liberation can both claim to be animated by the spirit of Christ. It could

also be argued that the imperative to be conformed to Christ is one that applies to all Christian disciples, and not only to those entering authorised ministry.

6. With reference to the introductory paragraph above about telos, as we reviewed the Institute we asked ourselves the question as to whether the Institute saw itself as having a clear view of a single telos, describable as “conformity to Christ” to which it was working, or whether within the programme there were accommodated a number of distinct teloi with respect to which different students who came from different traditions were working. Given the centrality of this phrase in the articulation of the aims of the Institute reviewers would like to feel that its use, and the richness within it, has been fully explored by those with responsibility for the oversight of the Institute.

### **Commendation 1**

**Reviewers commend the work of the principal in bringing together diverse information from a number of sources in a way that communicates clearly the aim of formationally-based ministerial training.**

### **Recommendation 1**

**We recommend that the Council take steps to clarify how it, itself, understands the phrase ‘conformity to Christ’ as it is used in reference to the tasks performed by the Institute, in its preparation of persons for authorised ministry in the church.**

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

7. Whilst reviewers recognised the work being carried out now which sets out to ensure that the formational aims of SEI are producing a training pathway that is appropriate to the ministerial requirements of its sponsoring church denominations, there was a question raised before the review about whether there is sufficient awareness of the needs of ministry in a future where both SEC and URC in Scotland will operate as minority church. Reviewers’ conversations with core staff, and particularly relating to the mixed mode training pathway offered evidence that there is flexibility and reflection inherent in the structures for changes to be monitored and responded to. Some stakeholder feedback did, however, suggest that challenges faced by the church in the current socio-political landscape will need deeper reflection, learning and praxis.
8. It has been noted that the SEI is a training Institute that operates under the overall governance of the Scottish Episcopal Church. It is not a separate institution as is the case with many English TEIs. Within its governance structures, as well as via those members of local church networks who lecture and share in the formation of ministry students, there is a natural connectivity with SEI’s sponsoring churches and denominations. That said, we believe it would be good to ensure there is intentional SEI-SEC communication about training to the church’s future as well as present needs, as paragraph 7 reflects, and our **Recommendation 2** addresses this.
9. One related issue, and also for the SEC rather than the SEI alone. As we note briefly at paragraph 78, the current student body is highly able; but perhaps it does not draw from the widest background whether in terms of education, socio-economic status or ethnicity. There may be constraints on what is possible, and vocations cannot simply be manufactured; but they can be encouraged. Might more intentional efforts at the discernment stage bear fruit, and be part of serving the future church more fully? Hence **Recommendation 3**.

10. The aims of the SEI are stated with crispness on the Church's own website, which reads:  
"The Scottish Episcopal Institute forms those preparing for a variety of authorised ministries in the Scottish Episcopal Church, lay and ordained, and in the United Reformed Church in Scotland, shaping vibrant missional ministers for today's world. It encourages an ethos of ongoing learning for all involved in ministry, both through its oversight of Continuing Ministerial Development and in the encouragement and resourcing of lifelong enquiry in a learning church. SEI has a Provincial Office, based in Edinburgh, and a dispersed operation throughout all seven dioceses of the SEC."
11. Also available on the Church's website are links to the Institute's Handbook for IME 1-3 training which again presents the work of the SEI clearly and with significant emphasis on the formational aims of ministerial training and its understanding of the role of the church in the world. This understanding is articulated throughout the handbook in references to the forming of community when gathered for residential events which is nonetheless sustained when students are dispersed, to field education's role in formation, to the expectation that students will 'surrender themselves wholly to the divine' and to the way students learn to be reflective practitioners in the whole of life.
12. One aspect of the formational programme which reviewers were unable to sample was the Bishop's Reflection Group. These are understood to be a valued and important aspect of the programme by both staff and students, and it was good to see that bishops are actively involved in the Institute's training programme.
13. Placement supervisors are a key link between SEI and the sponsoring denominations. Reviewers met with supervisors of different kinds of placement. There was evidence of communication about roles and expectations from SEI to the supervisors. We noted, though, that some supervisors with significant ministerial and educational experience were receiving the same level of training year on year. Greater recognition of the gifts of supervisors and the roles that they can play in training newer colleagues would provide for two-way communication and a reflective context in which changing ministerial expectations and experiences could be understood and incorporated throughout the training pathways.

## **Recommendation 2**

**We recommend that more intentional communication pathways between the sponsoring churches and SEI staff and Council be established with the purpose of ensuring students' formational pathways, and particularly the teaching programme, are preparing them for the shape of ministry required by the church in the future and not simply as it is at present. This should take into consideration an understanding of the particular place the SEC has within the Anglican Communion, both in terms of its history, and its more recent synodical decisions.**

## **Recommendation 3**

**Reviewers recommend that the SEI might work with the SEC to widen discernment and the range of potential candidates for training and ministry.**

## **Recommendation 4**

**We recommend a review of the gifts and expertise of placement supervisors so that wisdom might be gained from those with significant experience when training new supervisors and when reflecting on current practice and future needs of placements to provide students with valuable understanding of the church in which they will be serving.**

- A3 The TEI's aims, activity and achievement are understood and supported by wider church audiences.**
14. Reviewers noted that the SEI, being an institution that is structurally part of the Scottish Episcopal Church, means that it reports annually to the Church's General Synod. Decisions to set up the Institute in the way in which it currently operates were made by that Synod. This structural relationship would suggest that the wider church is in support of, and understands, SEI's aims, activity and achievement.
  15. A number of stakeholders, whose written comments were submitted in advance of the review, reported a significant level of understanding of how SEI operates and its formational ethos.
  16. The Communications Officer for the SEC was present at the Council meeting attended by reviewers. Although very new to the post, he was encouraged to contribute to the meeting and heard comments about the need to communicate certain agenda items with a wider audience.
  17. The SEI newsletter is informative and is not only available to existing students and other stakeholders, but is also accessible to anyone who browses SEI's website. Alongside the newsletter on the website is a link to the SEI Journal in which there is evidence of, and opportunity for students to learn about, strong connections with the wider church. Contributors inhabit many different roles (academic and ministerial) in the church, both informing, and being informed by, this mutually beneficial relationship. Reviewers found this to be a significant, and notable, publication.
  18. Additionally, reviewers were impressed by the way in which SEI's public profile is disseminated informally within the province and other church networks through a large number of clergy and laity who hold roles as pastoral supervisors, diocesan advisors, part-time tutors etc.
  19. Reviewers were very happy with all that was observed and noted in respect of this criterion. SEI is clearly training appropriately to, and communicating well with, the church as it is today. As is true for many aspects of training in established churches and training institutions, the nature of church is changing very quickly at the moment. It will be necessary for SEI and SEC to maintain clear lines of communication if the training can keep at least one step ahead of the types of ministry needed in the church of the future.

## **Commendation 2**

**Given the position of SEI within the SEC it is wholly appropriate and commendable that the Journal exists. The reviewers commend both the existence and the quality of the publication.**

## **Recommendation 5**

**This recommendation relates as much to SEC as it does to SEI. Reviewers would ask SEC to consider a method by which it can provide SEI with expectations of formation for those who will be in active ministry into the next generation of church in the province. It may be that this is fulfilled by the roles of some members or sub-groups of SEI Council and, if so, would benefit from being clearly articulated.**

**The review team has Confidence with regard to Criterion A: Formational Aims.**

## SECTION B: FORMATIONAL CONTEXT

- B1 The TEI draws on partnerships with theological educators in the region and local faith and community organisations to enhance training and formational opportunities for students.**
20. The SEI's relationship with Durham University is strong and contains ongoing review.
  21. The SEI maintains good relationships with the four ancient Scottish Universities (which have theological faculties). Reviewers met with members of staff of these bodies who are generous in making their time available to the Institute. This was perceived as being a great strength of both the SEI and the universities.
  22. The Council meeting attended by reviewers evidenced its good working relationship with, and challenge to, the SEC. URC relationships are also good. Reviewers noted with interest the new, and developing, relationship with Church Army. Reviewers were pleased to hear from both Church of Scotland and URC members of the Council that there is a "rich seam of working ecumenically together" and just how much understanding of community has developed in other denominations because of contact with SEI.
  23. SEI's external relationships are also enhanced by their links with dioceses. The role of the diocesan advisors working with all candidates is one which both supports and contextualises training. Many students, past and present, referred to the positive impact of their diocesan advisor throughout their period of training. Some students, however, did report that they do not have a diocesan advisor. We recommend that the very positive potential for this role should be unlocked by ensuring that all students are allocated someone in this role.
  24. Reviewers noted one external stakeholder's comment that there is a need for further development of external partnerships to prevent introspection. It is acknowledged that much has already been developed in this area of SEI's life and reviewers wish simply to **encourage** a continuation of this growth as SEI grows in areas of influence through differing ministry formation pathways and extended roles in some dioceses in wider articulations of lay ministries.
  25. The link with the church in Brazil was noted as having a potentially positive impact on students' understanding of the wider Anglican Communion as well as deepening their perception of how their own tradition relates to a wider church. Reviewers were impressed by the fact that this link is not only one of interest but of financial and teaching support.

### Recommendation 6

**The reviewers recommend that the SEI ensures all students are allocated a diocesan advisor so that all have access to this very creative and positive influence on their formation.**

- B2 There are well understood and embedded practices of corporate life, so as to enhance the process of students' formation.**
26. Corporate life is clearly valued by staff and students alike. The handbook makes clear that attendance at residential weekends is the core of the formational ethos of SEI.

27. Ongoing contact with the wider community is maintained through the use of Big Blue Button in SEIs teaching. Reviewers were pleased to sample teaching taking place using the Big Blue Button. While the method had its limitations the student body spoke warmly of it as a teaching tool.
28. Student feedback commended the venue for weekends which enhances corporate life and, together with staff encouragement and support, enables community formation among students that can persist beyond training.
29. The level of pastoral support offered to students from core staff and diocesan advisors and others was noted by reviewers and confirmed by students. Having said that, it was also evident to reviewers that the positive emphasis on corporate life and community enabled students to be pastorally aware of one another and to seek ways in which the whole body could benefit from individual gifts.
30. The SEC's commitment to funding 3 years of formation for all who will enter licensed, lay or ordained, ministry also seems to value this corporate aspect to formation. We commend both this and the way in which the whole SEI body is permeated by formational and community values and, in particular, the way in which this is made possible by clear leadership and trust in others to inhabit these values in a variety of personally authentic ways.
31. While the strengths of community life are evident in the high levels of support observed by reviewers, there was one question that recurred during the review weekend which was to wonder why there was little evidence of dissent or asking of difficult questions by members of the student body. Conversations with students and staff led to the conclusion that, while there is no direct suppression of such questions or challenging ways of relating to one another, there is such a concentration on creating safe space that some students do not feel able to 'rock the boat' by challenging others' or staff members opinions or beliefs – around, say, issues of diversity, theological viewpoint, personal discipleship or worship experiences. Whereas it might be good to find space to bring such issues into more open discussion and any inherent likelihood of disagreement be seen as formational opportunities rather than risks.
32. Core staff were concerned at the possibility that anything in the life of SEI's valuable mutually-supportive community might become an inhibitor of challenge and hence learning. In a learning community where good practice is modelled so consistently, might there be a need/possibility for building participants' capacity for sharing in appropriated criticism and challenge? This critique – reflected in **Recommendation 7** - was met by core staff without any sense of defensiveness, rather with open minds and a desire to find time to consider the points raised.
33. Reviewers recognised the difficulties in including students' spouses in much of the activity of the community with such a dispersed student body. The response of students to the family members who attended the final service and lunch of the weekend was evidence that the extended community is seen as valuable.
34. SEI is very well served by policies and handbooks. In written form, there are clear instructions for almost every eventuality. Having said that, it is not always easy to find where particular pieces of information are to be found. In addition there seems to be no easily accessible link to what should be done in the case of a safeguarding concern was to be raised relating to any aspect of SEI life. While it is recognised that the safeguarding policies of SEC are available, it would be helpful and add

clarity if a short addition to the SEI handbook contained a relevant link to any appropriate policies or to the first person to contact.

35. In addition to policies in handbooks, there is a significant amount of material relating to ethos. Written communication throughout SEI is impressive in its detail and the care with which wording is crafted. It was observed by members of Council that this level of detail has been particularly helpful and needed as SEI has established itself and communicated its ethos and purpose to the wider church.
36. However, it was observed by reviewers, and articulated by some who were spoken to as part of the PER, that there is sometimes a lack of carry-over between the written material and that which is communicated verbally to the SEI community. The effect of communicating such large amounts of information all at once can have the effect of transmitting a potentially rule-based environment to students and/or staff and others. This is clearly not the motivation behind the written material and staff are very skilled at putting into words a more flourishing ethos which reviewers would want to endorse and express admiration of. It was noted, though, that because something is in writing it is often not thought necessary to also inhabit the sense of the message in a personal, verbal, present way. Ensuring that information is also communicated in person, verbally and with time for questions and discussion will build on the significant written work already extant – hence **Recommendation 9** below. See also paragraph 43 and **Recommendation 10** relating to worship and feedback.

### **Commendation 3**

**We commend the way in which the whole SEI body is permeated by formational and community values and the clear leadership and ethos of trust that enable this.**

### **Commendation 4**

**We commend the SEC's commitment to funding 3 full years of training as its baseline for formation for all who will enter licensed or ordained ministries.**

### **Recommendation 7**

**Reviewers recommend:**

- i. **that core staff consider whether anything in the carefully crafted safe space of residential might inhibit freedom to bring issues of diversity, theological viewpoints, personal discipleship and worship experiences into open discussion; and**
- ii. **that as part of this process students and staff members be invited to express their views openly and freely and that those views are given due consideration when deciding on any necessary actions.**

### **Recommendation 8**

**We recommend that the SEI:**

- i. **restructure the handbook to make information more readily accessible; and**
- ii. **insert a section on safeguarding into the policies pages linking students to any relevant documents and stating clearly how to report concerns, with immediate contact details.**

## Recommendation 9

**Building on the comprehensive information available on SEI's website, in its handbooks, newsletter and journal, we recommend that attention is paid to how new members of the community gain an understanding of the ethos and practices of SEI.**

### **B3 The provision of public social and private living accommodation is satisfactory.**

37. Residential accommodation in Kinnoull is of a high standard allowing for distinct learning, worship and social spaces.
38. Social space allows for students and staff to be together in an informal environment. The short Burns Supper and ceilidh on the Saturday evening of the PER residential weekend were a particularly good example of use of such space and time and reviewers would encourage this kind of event to be a regular part of the gathered community's life.
39. There were no accessibility problems during the observed weekend and, as a centre for retreats, Kinnoull provides accessible accommodation.
40. Chapel space is adaptable and some of the worship organised by students made use of that adaptability in very creative ways.
41. Physical library facilities are not easily accessed due to the fact that they are in the SEC offices in Edinburgh and in a room which can sometimes be in use for meetings. Having said that, SEI arranges for students to become members, with full borrowing rights, of their 'local' University Library and, as students are all registered with Durham and studying on Common Awards programmes, electronic resources are significant.

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

42. The weekend of the PER provided a number of opportunities for worship. These were well-balanced, led by a variety of students and staff and evidenced the centrality of worship in SEI's corporate life.
43. Stakeholder comments did suggest that a wider range of tradition and theology would be beneficial. Reviewers acknowledge, however, that the representative student body can only be as wide in its experience as those who are sent by SEC and URC sponsors for training. There were opportunities to learn about, as well as to experience, a significant breadth of worship during the visit weekend.
44. While SEI encourages, in written form, a wealth of expressions of worship, this was another area that reviewers, based on student comments as well as observation, would encourage SEI staff to spend time communicating in person to those who will be planning worship. There was some sense of not knowing what would be acceptable or 'allowed' until feedback is received, having the potential to engender a sense of insecurity or worry. Encouraging students to 'try new stuff', where appropriate, and to know that not always getting everything right is part of learning could be effectively achieved through conversation allowing opportunity for questions and answers – hence **Recommendation 10**.
45. As a way of building students' confidence in their growing ability to lead worship, we would also ask via **Recommendation 11** that SEI considers ways in which feedback/review of acts of worship and

preaching might be, in the first instance, more personally communicated. Feedback being sent to students in writing and student-to-student feedback added to Moodle for many more people to read was perceived as potentially limiting confidence and willingness to take risks. Maybe small groups could be set up offering a level of peer feedback, allowing students to first reflect on their own perception of how an act of worship had gone, preceding the written feedback which could take into account this group, and peer input.

46. The worshipping community seemed to be intentionally inclusive. In particular great thought is given to inviting priests from SEC churches to preside at the Sunday Eucharist.

#### **Recommendation 10**

**We recommend that staff meet personally with groups of students to make explicit what is expected of students leading worship.**

#### **Recommendation 11**

**We recommend that the SEI considers ways in which feedback/review of acts of worship and preaching might be more personally communicated to students. Peer feedback via small groups allowing students' own reflection ahead of written feedback might be one option.**

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

47. Stakeholders refer to spirituality modelled by staff on a number of occasions. This was backed up by reviewers' own observations.
48. Kindness in the formational journey is seen as essential. Diocesan Advisors are trained; some reported that training as being extremely good and helpful. This training allows for spiritual crises to be dealt with in the dioceses rather than always by SEI staff.
49. Conversations with students and others led to advisors gaining the impression that staff are generous in sharing their knowledge from their individual experiences, faith and personalities. Some commented that this leads to a very good balance of study and awareness of the whole person with verities of personal gifts and ministries.
50. All conversations with staff members during the review weekend, both general and with specific questions in mind relating to areas requiring clarification, were met with openness, a desire to reflect and a non-threatened ability to expand reviewers' understanding.

**The review team has Confidence with Qualifications with regard to Criterion B: Formational Context.**

## SECTION C: LEADERSHIP AND MANAGEMENT

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

51. Ultimately the responsibility for the SEI lies with the Scottish Episcopal Church, through its General Synod. Under the Synod's Standing Committee sits the Institute Council, which maintains a relationship both with that Standing Committee and the College of Bishops of the Church. The members of the Council are appointed by the General Synod, but only on the nomination of the Standing Committee. The Council oversees the work of the Institute and its staff.

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

52. Reviewers were pleased to be able to attend a meeting of the Council, and to meet with representatives of the College of Bishops, as well as with all members of the core staff and were pleased to note that these bodies appear to have significant confidence in each other concerning the operation of the Institute.

53. Stakeholders and students were effusive in their affirmation of SEIs leadership, describing core staff as "excellent, unremitting, clear, approachable and prayerful", offering "superb" pastoral care and an example of "dedication to sheer hard work and attention to detail" as well as "laughter". The SEI's core staff team is identified by many as its greatest strength.

54. Core staff were mentioned by name on many occasions as being responsible for leading SEI through complex changes at many levels. Anne Tomlinson and Mike Hull have brought significant levels of energy and oversight to the formation and academic credibility of SEI over the past 5 years. More recent additions to the staff team Richard Tiplady and Linda Harrison bring the same level of commitment, energy and skill to their areas of expertise and offer a significant contribution to moving SEI forward. Our **Commendation 5** reflects the many affirmations that we heard.

55. There is a high quality of support and development of core and associate staff, the latter being inducted through consistent processes, whose work is monitored through peer evaluation and student feedback. Support is offered from those in leadership in the form of written materials, gatherings and supervision.

56. The leadership team exhibits, in written intent but also in observed practice, the ability to offer opportunities for feedback to contribute to reflective practice. Many instances of how this feedback is then acted upon were shared with reviewers, evidencing many ways in which this changes, develops and enhances student experiences in all areas of formation.

57. Reviewers were conscious that the staff at present is very able and highly effective. One question raised is about how easy it would be to recruit replacements when any member resigns or retires. The present staff has shaped the Institute as it stands, and replacement may prove to be difficult. We have no doubt that the SEI Council will be alert to the issue of continuity. Nonetheless, we offer **Recommendation 12** below.

### **Commendation 5**

**Reviewers commend the work of the whole SEI core staff team.**

## **Recommendation 12**

**We recommend that intentional work is carried out by the SEI Council and leadership team to ensure the sustainability of the SEI in a future without the present key core staff.**

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

58. As has been said above, members of the Council are appointed by the General Synod, on the nomination of their Synod's Standing Committee. Reviewers were told that the process of selecting persons with appropriate skills for this role does, in fact, work well.
59. The wide skill-base of council members was noted. When questions were asked of those in leadership roles, reviewers were informed that members are selected on the basis of their expertise as it relates to the needs of Council and SEI at the time of recruitment. It was also pointed out that people do not hold onto their roles on Council once they see that their skills are no longer the most needed. This was perceived as being a very healthy situation.

### **C4 The TEI has effective business planning and fundraising.**

60. Reviewers were pleased to be able to see the accounts of the Institute, and to hear that the Church has made available such funds as the Council at present requires. The overall financial health of the Institute cannot be separated from the financial health of the Scottish Episcopal Church as a whole.
61. Independent financial (fundraising) initiatives towards helping the work of the Institute take place, such as special collections in congregations, and when the Institute in its present form was established there was significant encouragement to do this, for example through legacies.
62. The Council meeting addressed a number of financial issues and reviewers had an impression of a committee that appears to have a good overview of budgetary needs and ways of funding training.
63. A number of developments in SEI's work were highlighted in the meeting of the council and in many conversations and interviews. Particular reference was made to the growth of mixed mode training and some involvement in lay training wider than that of Lay Reader courses. While these moves are creative and offer many valuable resources to SEC, there was a level of concern that staff may be being encouraged to develop training matters beyond the immediate task of SEI. As an institute for the training and formation of those entering authorised ministry it is important to remain focused on this task. It may be important to broaden involvement, for example as a way of assuring an area of the country that they are getting 'value' from the Institute even if they do not have many ordinands or lay readers in training. However, excessive diversification could overload a finite staff – unless, of course, resources are looked at as well.

## **Recommendation 13**

**Reviewers ask the Council to consider, in dialogue with the SEC, whether it wants the Institute to involve itself with general discipleship training. If this expanded role were to be developed, we recommend that implications for staff workload and for its resourcing by the SEC are assessed.**

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

64. Risk management documents of the SEC were available for reviewers to see. Again, the point is made that SEI's financial health is intrinsically tied into the health of the SEC.

**The review team has Confidence with regard to Criterion C: Leadership and Management.**

## SECTION D: STUDENT OUTCOMES

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

65. One way in which students gain such knowledge is through placement experiences. The recently added learning pathway by means of mixed mode training was reported upon by students and supervisors as a positive initiative being well introduced and embedded by Richard Tiplady.
66. The SEI handbook evidences the intention to grow such qualities in students. Diocesan Advisers' roles would seem to be to encourage many of these qualities. During the review we found that where DA roles work well this is indeed the case. Some students stated that they do not have DAs – hence **Recommendation 6** at section B1 – and we would also raise a question about whether the same person being the staff lead on mixed mode training as well as DA to mixed mode students allows for sufficiently varied support of those candidates.
67. Students and past students spoke of the value of placements and context-based learning. There was a sense that all aspects of formation are approached by staff with a deeply prayerful and supportive attitude towards the planning, as we heard on numerous occasions, and we commend this. One person wrote of being “stretched, disturbed and rewarded.”

### **Commendation 6**

#### **We commend the deeply prayerful way that core staff model leadership and support of students and others involved in teaching, academically and contextually.**

68. Durham colleagues' separate report will comment fully on the delivery of academic programmes. From the Ministry Team and SEI reviewers' perspective, there are two general points to contribute. First, that stakeholders who offered views in writing before the review visit commended, on a number of occasions and from differing perspectives, the SEI's provision of high-quality teaching and teaching materials. The reviewers' experience of a brief snapshot of teaching during our visit bore this out.
69. And second, however: that while acknowledging again that we observed just a small sample of teaching and learning, we would ask whether there is more scope for diversity in learning and assessment. There seemed to us to be an over-reliance upon lecture and essay.

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

70. Stakeholders expressed an understanding that the TEI is “working hard in formation to shape ministers who are missional, adaptable and collaborative”.
71. While reviewers had little opportunity to experience these qualities directly during the residential visit, conversations with students and others suggested that students are preparing for ministries that will be outward-facing and being aware of the needs of their local contexts.

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

72. Placements were referred to by a number of stakeholders as being well organised and a strong element of the training, encouraging the development of students' spirituality and experience of public worship.

73. The SEI handbook highlights personal spiritual development and encouragement of an intentional prayer life through daily offices. The worship that we experienced during the weekend bears this out.
74. Small groups within the student body are referred to in the handbook. As the weekend progressed reviewers became more and more aware of how important these groups are to the spiritual and worshipping life of the community.
75. Worship experienced at the residential weekend was appropriately 'of the tradition' but with creativity even in short liturgical morning prayer. Confidence gained by being a member of a student small group planning worship together, as well as the clear collaborative style that this leads to, were both referred to by students and evident to reviewers.
76. No additional recommendations have been made here but please see also comments at Section B4 and **Recommendations 10** and **11**.

**D4 Students' personality, character and relationships.**

77. Reviewers heard of the very positive effect of being part of what is perceived as being a diverse group. Some students feel that respect has grown through open and honest conversation which has sometimes included, and always been encouraged by, core staff. While this is one experience, others expressed a feeling that difficult conversations about difference did not always happen and that SEI finding ways to facilitate and encourage spaces in which students can challenge and be challenged, learning from one another and gaining experience of handling difference within appropriately professional boundaries would be of benefit. This relates to **Recommendation 7** in as much as it is a formational issue from both input and outcome perspectives.
78. Reports from placement supervisors, diocesan advisors and those who work alongside past students, as well as observations of the way in which students related to one another at the residential weekend, suggest a high level of ability in forming relationships and supporting one another. This is also reflected in conversations with those in ministry who have trained through SEI and in SEC contexts. Being a small province, many in ministry have known and supported one another for many years. This is understood, and reflected by, SEI staff.

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

79. Similar to other observations, SEI is a small community and as such has plenty of opportunities to encourage students in leadership roles, in collaboration, and in working as a community.
80. The current student body consists of many very able students. In observation and conversation with staff, students and supervisors, reviewers were aware of the skills brought to the community both of leadership and relational abilities which are encouraged to flourish by staff and students alike.

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

81. A small TEI serving a whole province makes for a clear understanding of the nature of ministry within the traditions of the sponsoring church. Reviewers heard this understanding expressed very clearly by past and present students.

82. It may not be so true that students are as confident about their calling to ministry in a church whose place in society and its traditions may change significantly in the next few years. This may be something that cannot be taught but the need to consider training strategies for a changing church was highlighted in student feedback. On this point, see also Section A2 and **Recommendation 2.**

**D7 Pioneer ministry training**

83. This criterion does not apply as the SEI does not formally train students for pioneer ministries.

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

84. While reviewers were able to hear much discussion as to how pieces of work were assessed within the Institute, it was not possible to share in any detailed discussion concerning the production of a final assessment before ordination, which would in many places result in the production of a formal report for the student's bishop. We were conscious that SEI is in a slightly different position from many TEIs elsewhere, insofar as the candidate's bishop is intimately involved in the candidate's training throughout IME 1-3 (through the *Bishop's Reflection Group*), and the bishop will have been able to form a judgment, in consultation with other core staff, about the training of the candidate in question.

85. However, that does not obviate the need to report *to the candidate* on how they had progressed throughout the course. Such interim feedback as we observed was given to students was generally well constructed. Indeed, the whole atmosphere of the Institute was one of trust between staff, students and bishops, and so although the process of a final report being constructed was not observed, reviewers have every confidence that when this happened it would be done with both rigour and fairness. No negative comment about past reports was made by any stakeholders.

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

86. Personal learning plans were referred to, maybe not by that name, but as a clear understanding that each student's learning pathway is individually designed. The transition to further training after IME 1-3 was also commented on a number of times by those in ministry in SEC and by staff. There is a close link between SEI and those in early years of ministry in SEC and it seems that the numerically small nature of the extended SEI community makes such personal learning pathways and ongoing learning plans a natural part of how SEI and SEC relate.

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

87. Stakeholder comments available to reviewers prior to the PER weekend expressed awareness that feedback from students is heard and respected but sometimes the feedback loop is not closed. On questioning staff and students and observing the relationship between these groups, reviewers were confident that this issue has been addressed and that feedback now results in action on all issues where action is possible and appropriate.

88. Less obvious was how SEI receives feedback from students after licensing or ordination, receiving parishes and supervisors of those in the early years of their ministry that would allow the feedback loop to extend to awareness of changes that might be made to IME 1-3 in the light of beginning to practise the ministries for which students are being trained. Again, though, due to the nature of the relationship between SEI and SEC, this is something that probably happens naturally. Reviewers do not wish to formally recommend changes here, but would **encourage** SEI to build on good practice and create space for such feedback to be intentional as well as intuitive.

**The review team has Confidence with regard to Criterion D: Student Outcomes.**

## **CONCLUSION**

### **Overall outcome:**

**The review team has Confidence in the Scottish Episcopal Institute in preparing candidates for ordained and licensed lay ministry.**

## **LIST OF COMMENDATIONS**

### **Commendation 1**

Reviewers commend the work of the principal in bringing together diverse information from a number of sources in a way that communicates clearly the aim of formationally-based ministerial training.

### **Commendation 2**

Given the position of SEI within the SEC it is wholly appropriate and commendable that the Journal exists. The reviewers commend both the existence and the quality of the publication.

### **Commendation 3**

We commend the way in which the whole SEI body is permeated by formational and community values and the clear leadership and ethos of trust that enable this.

### **Commendation 4**

We commend the SEC's commitment to funding 3 full years of training as its baseline for formation for all who will enter licensed or ordained ministries.

### **Commendation 5**

Reviewers commend the work of the whole SEI core staff team.

### **Commendation 6**

We commend the deeply prayerful way that core staff model leadership and support of students and others involved in teaching, academically and contextually.

## LIST OF RECOMMENDATIONS

### Recommendation 1

We recommend that the Council take steps to clarify how it, itself, understands the phrase 'conformity to Christ' as it is used in reference to the tasks performed by the Institute, in its preparation of persons for authorised ministry in the church.

### Recommendation 2

We recommend that more intentional communication pathways between the sponsoring churches and SEI staff and Council be established with the purpose of ensuring students' formational pathways, and particularly the teaching programme, are preparing them for the shape of ministry required by the church in the future and not simply as it is at present. This should take into consideration an understanding of the particular place the SEC has within the Anglican Communion, both in terms of its history, and its more recent synodical decisions.

### Recommendation 3

Reviewers recommend that the SEI might work with the SEC to widen discernment and the range of potential candidates for training and ministry.

### Recommendation 4

We recommend a review of the gifts and expertise of placement supervisors so that wisdom might be gained from those with significant experience when training new supervisors and when reflecting on current practice and future needs of placements to provide students with valuable understanding of the church in which they will be serving.

### Recommendation 5

This recommendation relates as much to SEC as it does to SEI. Reviewers would ask SEC to consider a method by which it can provide SEI with expectations of formation for those who will be in active ministry into the next generation of church in the province. It may be that this is fulfilled by the roles of some members or sub-groups of SEI Council and, if so, would benefit from being clearly articulated.

### Recommendation 6

The reviewers recommend that the SEI ensures all students are allocated a diocesan advisor so that all have access to this very creative and positive influence on their formation.

### Recommendation 7

Reviewers recommend:

- i. that core staff consider whether anything in the carefully crafted safe space of residential might inhibit freedom to bring issues of diversity, theological viewpoints, personal discipleship and worship experiences into open discussion; and
- ii. that as part of this process students and staff members be invited to express their views openly and freely and that those views are given due consideration when deciding on any necessary actions.

### **Recommendation 8**

We recommend that the SEI:

- i. restructure the handbook to make information more readily accessible; and
- ii. insert a section on safeguarding into the policies pages linking students to any relevant documents and stating clearly how to report concerns, with immediate contact details.

### **Recommendation 9**

Building on the comprehensive information available on SEI's website, in its handbooks, newsletter and journal, we recommend that attention is paid to how new members of the community gain an understanding of the ethos and practices of SEI.

### **Recommendation 10**

We recommend that staff meet personally with groups of students to make explicit what is expected of students leading worship.

### **Recommendation 11**

We recommend that the SEI considers ways in which feedback/review of acts of worship and preaching might be more personally communicated to students. Peer feedback via small groups allowing students' own reflection ahead of written feedback might be one option.

### **Recommendation 12**

We recommend that intentional work is carried out by the SEI Council and leadership team to ensure the sustainability of the SEI in a future without the present key core staff.

### **Recommendation 13**

Reviewers ask the Council to consider, in dialogue with the SEC, whether it wants the Institute to involve itself with general discipleship training. If this expanded role were to be developed, we recommend that implications for staff workload and for its resourcing by the SEC are assessed.