

# SCOTTISH EPISCOPAL CHURCH



Vocations Advisors, Wardens of  
Lay Readers, and Assistant  
Director of Ordinands

## HANDBOOK

Update: December 2023

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## MINISTRIES: Ordained and Lay

Vocations Advisors (VAs) are asked to guide the local discernment process with the PDO and diocesan bishop for ordained ministry and some authorised lay ministries. Wardens of Lay Readers and Assistant Director of Ordinands (ADOs) are asked to guide the provincial process with the PDO and diocesan bishop for Lay Readers and the ordained ministries: Vocational Diaconate, Vocational Priesthood.

Candidates for priesthood may only be recommended provincially for training to either Incumbent Priesthood or Assistant Priesthood. They are not recommended within these two categories of priesthood for specific roles such as chaplaincy or ordained pioneer ministry, but they may be recommended for Mixed Mode training.

The ministries for which candidates may be sponsored are described in detail in the paper '**Ministries in the Scottish Episcopal Church**'. This paper delineates the Core Responsibilities, Criteria for Selection and Formation Outcomes for Lay Readers, Vocational Deacons and Priests. The comparative tables at the end of the paper may be helpful for both VAs, Wardens and ADOs and candidates to discern a specific ministry. Currently, general Lay Ministry is considered locally, but work is underway by the College of Bishops to offer the required consistency of oversight for Lay Ministry and their authorisation such as: Eucharistic Assistants, Worship Leaders; Pastoral Assistants. VAs are involved in discerning all the potential pathways for the enquirer and offer their report to the diocesan bishop for a recommendation.

Throughout the discernment process the Criteria for Selection are used for evidence-based reporting by the VA, Warden and ADO to help build a picture of the pathways available to the Enquirer/Candidate. The term "Enquirer" is used for an individual beginning the process with a VA until recommendation for the appropriate pathway by their diocesan bishop. Once an individual has completed their *local discernment*, and only when recommended to meet a Warden of Lay Readers or an ADO, the individual continues the process as a "Candidate" and this begins *provincial discernment*. These terms will be used throughout the handbook. Making this distinction reduces the expectations and local pressure on the individual. The emphasis is always to validate an individual's gifts by clear discernment for future ministry: lay or ordained.

### POLICY ON CHANGE OF PATHWAY FOR SEI STUDENTS

It is important that the enquirer's potential ministry is discerned clearly. Ordinands or Lay Readers in training who perceive they are called to a different ministry must discuss this first with the Principal of SEI.

The Principal will write to the student's bishop, including the PDO, giving recommendations for a decision. If the bishop agrees with the perceived change to the pathway for training and formation, the student may complete their academic year, withdraw from SEI, and begin their Discernment process anew under the oversight of the PDO.

On completion of the SEC Discernment process, and if their bishop agrees, the student may continue with SEI from the beginning of a new academic year training on the new pathway for ministry. Expectation of outcome is not guaranteed before the discernment process and the student may not assume that the original pathway can be continued. The decision of the diocesan bishop is final.

# THE DISCERNMENT PROCESS

In the Scottish Episcopal Church, final decisions about selection for training, and then ordination to the diaconate or priesthood or licensing for Lay Readership are made by the candidate's diocesan bishop.

The bishops involve the PDO, ADOs, Wardens and VAs in the discernment process and the clarity of decision making is aided by a Discernment Meeting and an Advisory Selection Panel, both involving lay and clergy members. A flowchart [*Appendix 1*] is available to highlight the process for all involved.

## Core Values

The values held by everyone involved within the *Discernment Process for Ordained Ministry* have been agreed by the Bishops, PDO, Vocations Advisors, Assistant Directors of Ordinands, Wardens of Lay Readers, Discernment Meeting personnel and Advisory Selection Panel personnel. Incumbents, Enquirers and Candidates are to share in these core values of Hospitality, Honesty and Integrity. Throughout the process, informed by prayer and pastoral sensitivity, all involved shall offer welcome, kindness, and respect.

## Core Beliefs

In Jesus the Kingdom of God came among us.

All members (of Christ's body) are called to discover, with the help of the community, the gifts they have received and to use them for the building up of the church and for service of the world to which Christ is sent.

We have confidence in God, in the Church, in each other and in the *Discernment Process*.

## DISCERNMENT IN THE CONGREGATION OR CHAPLAINCY WITH THE INCUMBENT & VA

It is important that an individual is first referred to the PDO by a formal letter or an email from an incumbent. An *Initial Enquiry for Vocational Discernment Form* is completed, available from the PDO. This begins the process as outlined in the SEC's *Discernment Process for Ordained Ministry*, available online. The diocesan Bishop is informed by the PDO. The Bishop and Incumbent should have a clear understanding as to confidentiality and the role of the Vestry.

The incumbent should offer an enquirer with confidence, after careful discussion. If the enquirer is referred too soon or without enough reflection, it can cause problems later, for a non-recommendation for training becomes increasingly painful as the process continues. It is important to note that whilst the Discernment Process for Ordained Ministry and Lay Readership begins locally, and has a later provincial stage, it is the enquirer/candidate's sponsoring incumbent and their charge that must remain pastorally and prayerfully supportive throughout. Some thought should be given locally as to the support the candidate will receive. The PDO directs the enquirer to a Vocations Advisor (VA) and this is the first step in the process. The Vocations Advisor will meet the incumbent, the candidate, and the candidate's partner/spouse/family throughout the local process ensuring this support.

The incumbent or chaplain and VA may be helped by the **Guidance for Incumbents & VAs** to aid discussion with the enquirer at the preliminary stage. This is available online and may be offered by the PDO.

## DISCERNMENT WITH THE VA, WARDEN AND ADO

The enquirer should expect to meet with the VA for several months.

### Interviewing

**Interviewing** will take different forms with the VA, Warden and ADO. The initial meeting(s) with the VA will involve hearing the life story of the enquirer and obtaining some basic personal details looking at the Criteria for Selection in outline and building an evidence base for further reflection. The bishop will interview the enquirer to complete the local discernment process in the diocese.

A meeting with the PDO may move onto a more in-depth discernment of the Criteria, and reflection on any development work to be undertaken before subsequent meetings with the ADO, or Warden in the case of potential Lay Readership. On completion, the enquirer becomes a candidate for the discernment process for ordained ministry or Lay Readership.

### Paperwork

VAs, Wardens and ADOs should keep a record of each interview, detailing what was discussed and proposed, and arrangements for any subsequent meeting. This should be copied to the individual (and possibly the PDO). This record will prove helpful for 'evidence-based reporting', reflecting on the candidate's progress for the Discernment Meeting and to assist the diocesan bishop and PDO for the eventual Advisory Selection Panel.

During discernment with the ADO, or Warden for Lay Readership, the candidates should complete a **Registration Form** which allows them to demonstrate their self-awareness and ability to reflect, as well as sharing how they might envisage their contribution to the ministry of the Scottish Episcopal Church.

There should be some **continual screening for practical issues** which may need dealing with for VAs, Wardens and ADOs, remembering that an individual's circumstances may change:

### Relationship status

For candidates exploring the possibility of ordination, it is important that they reflect on the promises set out in the Scottish Ordinal 1984. These include a declaration made in response to the question:

*“Will you, in all your dealings with others, in the life of the Church and in your home, seek to show an example of obedience to the way of Christ?”*

This is an expression of the teaching of the Church that faithful, committed relationships are a reflection of the generous, covenanted love of God.

In the light of this, the Diocesan Bishop has to be satisfied that, at the point in the process of discernment at which they are sponsoring a candidate to the Advisory Selection Panel, the candidate's chosen lifestyle reflects this teaching, as expressed in the Ordinal. In practice this means that if a candidate is living in a committed relationship they should, by that point in the process of discernment, be either married or in a civil partnership.

Candidates who are **divorced** do not have to apply for special permissions to become a candidate for ordination, although the discernment process will explore whether there has been sufficient

reflection on the marital breakdown and whether relationships are as healed and resolved as can be expected.

Candidates in **Civil Partnerships and Same-Sex Marriage** also do not have to apply for special permissions to become a candidate for ordination.

In the light of the changes to Canon 31 in June 2017, the College of Bishops issued Principles and Guidelines for the SEC. It states:

*In the light of this, we affirm the following four guiding principles and commend them to our church.*

- 1. Acknowledging the internal diversity of the Scottish Episcopal Church, we seek to maintain the highest possible degree of generosity and communion within the Church's life.*
- 2. Those who minister within the Scottish Episcopal Church must be prepared to acknowledge that the church has reached a clear canonical position but one which recognises diversity of view and practice.*
- 3. We remain committed to the flourishing within the Church's structures of all those whose understanding of marriage lies within the spectrum of teaching and tradition of the Anglican Communion. This includes those in authorised ministry in the Province and those who may seek such authorisation and those who may seek ordination.*
- 4. We acknowledge that the Church's new canonical position is set within a broader theological and pastoral conversation within the Anglican Communion and the whole Church of God.*

*These Principles inform each other, and they should be read and understood together.*

Candidates should be made aware of the importance of this guidance by the ADO for their future ministry. Wardens should similarly advise candidates for Lay Reader Ministry.

## Confirmation

Candidates for ordained ministry and Lay Readership must have been episcopally confirmed by the time they go to an Advisory Selection Panel.

## Age

Legislation about age discrimination prevents there being any formal age limits for all candidates in the discernment process. There are two grounds on which age might be a legitimate factor in the process:

- (i) if the candidate cannot realistically offer sufficient years of service to merit the financial investment by the SEC that training would involve. This might be countered by the candidate financing the training themselves.
- (ii) if the candidate's age prevents them from fulfilling the Criteria for Selection. This might apply, for example, if they were unable to demonstrate the creative missional leadership of a potential incumbent, or a realistic and deliverable vocation.

Bishops require all candidates, where age is not a legitimate factor, to go to an Advisory Selection Panel (ASP).

## Visas for non-UK/EU candidates

Neither the General Synod nor SEI are authorised to issue a certificate of sponsorship for a student visa (Tier 4). Consequently, candidates' ability to be in the UK cannot be dependent on

their expectation that we will simply be able to issue a certificate of sponsorship for a student visa. Their right to be and remain in the UK will need to be dependent on some other relevant immigration category.

It is, therefore, essential that VAs, Wardens and ADOs confirm with enquires/candidates at an early stage whether they have the right to remain in the UK, as agreed by the UK Border Agency, and the correct Visa, were they to be selected for training and also, on the assumption that they might need to work to support themselves during training, that they have the right to work in the UK. This may apply to a spouse or family member and should also be checked as to how this affects the status of the candidate for training and work.

## Health, legal and financial status

The candidate should disclose any health problem or disability which might affect their capacity to train or to minister in the SEC.

The Charities and Trustee Investment (Scotland) Act 2005 provides that certain individuals are disqualified from acting as charity trustees. Those who serve as ordained ministers and as incumbents, as well as vestry members, will normally be regarded as “charity trustees” for the purposes of the Act. It is, therefore, recommended that those seeking ordination should confirm their eligibility to act by signing the SEC Charity Trustee declaration. This should be drawn to the attention of prospective ordinands by the ADO when completing their Registration Form. Anyone who acts as a charity trustee while disqualified is guilty of an offence punishable by imprisonment, or a fine, or both. A person is not disqualified if any previous conviction is spent by virtue of the Rehabilitation of Offenders Act 1974.

If there is a concern about the candidate’s psychological stability, this requires to be discussed with the PDO, whether they should undergo a psychological assessment. Each candidate must provide a **Confidential Declaration** about their potential PVG status before they attend an Advisory Selection Panel.

**Financial assistance for Full Time ordinands:** A grant is provided by the Scottish Episcopal Institute to enable full time study at a Scottish University. The maximum level of grant is agreed annually (£16,494 for 2023-24 and is means tested (any grant paid reduced to reflect any other income the candidate receives. The additional permitted income caps applicable for 2023/24 are £3,300 and £5,500 for ordinands without and with dependants respectively). Potential candidates should submit a completed application form to the PDO to enable the level of grant to be determined. The application should be submitted as soon as possible but, in any event, not later than 30 November in the year prior to the year of commencement of study.

In most cases University Fees will be paid by SAAS (Student Awards Agency for Scotland) – candidates should ensure that appropriate application is made to SAAS. An annual bursary of £1,000 is also payable by SAAS to candidates over 25 with household incomes less than £21,000 – candidates should ensure that appropriate application is made to SAAS.

**Financial Assistance for Mixed Mode ordinands:** An annual grant is provided to enable full time study during the duration of the Mixed Mode placement. The maximum level of grant is agreed annually (£16,494 for 2023-24) and is means tested (any grant paid reduced to reflect any other income the candidate receives). The grant is administered by the Scottish Episcopal Institute and is funded jointly by the Institute and the placement charge / diocese. Potential candidates should submit a completed application form to the Director of Mixed Mode Training to enable the level of grant to be determined. The application should be submitted as soon as possible but, in any event, not later than 30<sup>th</sup> June in the year prior to the year of commencement of study.



## Equal Opportunities Statement

At all stages of the discernment process, our aim is to provide equality of opportunity for all enquirers and candidates to the ministry. We are committed to ensuring that individuals are treated equally and fairly, and that recommendations at all stages of the process are based objectively on evidence obtained in relation to Criteria for Selection.

We will not discriminate, directly or indirectly, on the grounds of culture (including race and skin colour), ethnic or national origin, age (except in the circumstances set out on page 4), gender, sexual orientation, disability, social class, marital status, membership of a trade union, or political affiliation (each a 'Protected Characteristic'). Nor will we discriminate on the grounds of nationality (including citizenship), provided that the enquirer or candidate has the necessary approval from the relevant authorities or is otherwise entitled to work in the UK. Since the intention is to explore whether the enquirer or candidate should be recommended for training for ministry with the SEC, it is a requirement that they are a member of SEC and subscribe to its training and formation principles.

If a candidate has a disability, we will provide reasonable adjustments and dedicated support where necessary to allow them to fully participate in the process, irrespective of any disability.

In undertaking any Discernment Meeting and Advisory Selection Panel, all interactions with and about the candidates are to be free from victimisation, harassment, and bullying.

In the course of each Discernment Meeting and Advisory Selection Panel, those conducting the meeting or panel may ask questions which relate to difficult life experiences and how these have been dealt with in the life of the enquirer or candidate, in accordance with our Criteria for Selection. Sometimes, these questions may relate to a Protected Characteristic, or an incident which has occurred in relation to a Protected Characteristic. In these cases, questions should only be asked where relevant to one of the Criteria for Selection, for example in terms of ability to cope with disappointment, conflict, anger, or stress. These questions should always be asked in a way that reflects SEC's concern for the individual and in order to help with a wider assessment of whether the candidate's personal sense of vocation for a recognised ministry is in line with the agreed Criteria for Selection.

If an enquirer or candidate has concerns about the conduct of any individual involved in the discernment process, they should submit a formal written note of complaint to the PDO. Any such note of complaint must be submitted within one month from the time of the conduct complained of. The PDO shall consider and investigate the issue, including speaking to the enquirer or candidate to request any further details and if appropriate contacting the bishop of the enquirer or candidate. The PDO shall communicate the outcome of the complaint in writing to the enquirer or candidate. There is no right of appeal from this decision

## DISCERNMENT IN THE PROVINCE

The PDO meets the candidate and then will refer them to the Assistant Director of Ordinands (ADO) or a respective Warden of Lay Readers, who interviews the candidate over several months. This provides a further element of discernment and provides evidence as to whether the candidate is ready to proceed to a Discernment Meeting. The ADO, Warden and candidate will use the **Criteria for Selection** and a **Discernment Curriculum** as discernment tools during their meetings, and the candidate may be required to do reading and written work, undertake practical ministry, and broaden their church experience. Suggestions for development work based on the Criteria for Selection are found in the **Discernment Curriculum** in this handbook.



ADOs and Wardens may find it helpful to use the **Criteria Assessment Sheets**, so as to gather material for the Discernment Meeting.

## Discernment Meeting

The Discernment Meeting consists of two lay people and one clergy person. One of these three is designated the Chair. It is an intermediate step and checks both identified strengths and weaknesses of a candidate as reported by a Warden or ADO against the selection criteria. The Bishop receives a report via the PDO from the chair of the Discernment Meeting to consider whether the Candidate is to be considered for the final stage: The Advisory Selection Panel.

It is important at this stage, after the Discernment Meeting, that the candidate meets their diocesan bishop. The PDO is informed as to whether the bishop recommends a candidate to go (or not) to an Advisory Selection Panel. This should be agreed with the bishop initially, as it will depend on the category of ministry for which they are sponsored.

Candidates for Lay Readership, Vocational Diaconate, Incumbent priesthood and Assistant Priesthood should always go to an Advisory Selection Panel, if recommended.

The bishop may decide that the candidate does further discernment work or is not recommended for ordained ministry or Lay Readership. The ADO, or respective Warden de-briefs the candidate after the Discernment Meeting, which may involve helping the candidate to come to terms with a non-recommendation. The PDO will ensure that any preparatory or development work is done for an Advisory Selection Panel (e.g. revising their Presentation and Group Exercise).

## Advisory Selection Panels

These are held between Oct/Nov and March/April, to ensure that candidates may obtain places on the Scottish Episcopal Institute training programme. (Admission Request must be made by the candidate before June and local planning arrangements for Mixed Mode training has to begin in Dec /January before the following June confirmation of admission to SEI). There will be no more than 6 candidates per Advisory Selection Panel. The Panel is held over two days from 11 a.m. on a Wed or Thurs to after lunch on Fri or Sat. The diocese funds travel to the Panel for candidates, and the Province funds any overnight accommodation required on the Wednesday or Friday evening. (see **Finance Tables**).

Candidates really appreciate **a card from the ADO or Warden** awaiting them at the Advisory Selection Panel.

Candidates for ordained ministry will have two interviews, each with a pair of advisers. They will also be involved in a Group Exercise and writing a short reflection on the experience of the exercise. The PDO writes a full Advisory Selection Report of the Panel, based on the Advisors' written reports, for the candidate's diocesan bishop and a copy for the ADO.

Candidates for Lay Reader ministry will be interviewed by a Warden and experienced lay reader. The Warden from the candidate's diocese will also be present to facilitate the interviews and collate the report for the PDO.

Candidates will not be asked to lead worship or lead intercessions but they will be asked to read from the Bible at occasions during worship. This will be indicated to the candidate before the date of the Panel to enable preparation.

## Paperwork for the Advisory Selection Panel (ASP)

This will be overseen by the PDO and must be submitted no later than 3 weeks before the Panel by the candidates with the support of their ADO or Warden.

### ADO

The PDO completes the Sponsoring Forms in consultation with the ADO. Candidates also submit a Pastoral Encounter Exercise which includes a description of the situation, a verbatim report, and a reflection on their own contribution and the contribution of others.

With the support of the ADO, candidates for ordination should submit the following:

- Registration Form
- Pastoral Encounter Exercise
- Incumbent Reference
- Personal Reference
- Academic Reference or Occupational Reference
- SEC Confidential Declaration PVG
- SEC Charity Trustee Declaration

### Warden of Lay Readers

- Registration Form
- Incumbent Reference
- Vestry Reference
- SEC Confidential Declaration PVG

#### **NB: References:**

##### ***Referees:***

Referees should be **balanced in terms of gender and clergy/laity**.

Referees should **not be related to the candidate** or to each other.

Some of the referees should have **known the candidate for more than 2 years** in order to provide a good overview and evidence of development and growth.

Referees should be **from different contexts**, e.g. if a candidate works in a church context, not all the references should come from there, or an additional referee should be found, to give some balance.

While a candidate has every right to choose their own referees, sometimes their choice may not offer the scope and breadth that would be helpful, so please **offer guidance to candidates in choosing their referees** for the most appropriate person as opposed to the most obvious person.

##### ***References:***

References should be **dated and signed** (electronically will do).

**References should be no more than six months old** by the time of the ASP. If they are older, then referees need to be invited to update the reference

- The PDO will complete Sponsoring Form 1 and Sponsoring Form 2 for the ASP.

After the Advisory Selection Panel (ASP), the diocesan bishop will decide on a recommendation to begin training with SEI.

Candidates may be recommended for training, not recommended, or conditionally recommended. Once the PDO is sure that the bishop has communicated the recommendation to the candidate, the PDO should be in touch to arrange to meet for a debriefing.

## FINAL DECISIONS

The candidate's diocesan bishop decides what the candidate will do next on the basis of the various recommendations. In practice, they almost always follow the recommendations of the Panels. At this stage, the candidate may begin training, but the decision has not yet been made as to whether they will be ordained at the end of training. Again, in practice, it would be very unusual for them not to be, but it has happened.

### The care of non-recommended candidates

This is a difficult and delicate area, which calls for co-operation between the bishop, PDO, ADO, Warden, VA, Incumbent, and others (e.g., a Spiritual Director). The Incumbent may be as disappointed and critical of the process as the candidate or may now reveal that he or she had serious misgivings all along. If candidates have been well-prepared about the process and the possible outcomes, they will find it easier to come to terms with a non-recommendation. Incumbents will be introduced to this policy and encouraging to take their pastoral responsibility to the candidate during this time of discernment seriously.

The VA has an important role, at the earlier stage of local discernment, working with the enquirer and offering pathways suitable to the enquirer's discerned gifts and abilities. It may help the individual to continue with authorised lay ministry before further discernment about ordained ministry. The policy for the care of non-recommended candidates is included in Appendix 3, page 16.

### Concerned Observation process

The policy for handling any information coming from outwith the current formal interview or conversations within the Discernment process is described fully in Appendix 4, page 18. For example, a comment or complaint about an Enquirer/Candidate from a church/ clergy member, or public social media observation. This policy also covers how to handle more local concerns from within any local conversations between a VA, ADO, recommending Rector/priest.

### Helpful resources

CPAS Resource Sheet 7 – PDF file found by entering the title into a browser.

and *When the Church Says 'No'*, Helen Thorp, (Grove Booklets, P98) see:

<http://grovebooks.co.uk/products/p-98-when-the-church-says-no>

## TRAINING AND FORMATION

Ordinands are formed and trained by the Scottish Episcopal Institute (SEI), alongside Lay Reader candidates.

They are required to **register with SEI by the beginning of June** in the year that they will begin training, so all recommendations by the Advisory Selection Panel have to be made by that date.

Ordinands' training pathways depend on their previous education and future ministry:

**Incumbents** must attain degree level in theology by the end of IME 6 (end of curacy).

**Assistant priests** and **Vocational deacons** must attain diploma level before ordination.

All candidates follow a three-year course of formation; those with existing theology degrees can continue academic studies at a higher level alongside residential learning, modules in areas not yet covered and field education.

Some ordinands may be offered a bursary by the SEC to complete a three-year theology degree at a Scottish university; funds for this are limited and would apply only to Incumbent ordinands.

Other ordinands would take the Common Awards (CA, Durham University) diploma in theology and ministry. This is a three-year course, for which entry is offered every year. Incumbent candidates study during their curacy for further CA credits which lead to a degree being awarded.

Prior to beginning training candidates may be invited to study elements of the SEI Foundation Year course in study skills, Biblical studies, Hermeneutics, Field Education and Worship.

Further details about SEI, training and formation may be found at:

<http://www.scotland.anglican.org/who-we-are/vocation-and-ministry/sei/>

## SEI CONTACTS

### **Scottish Episcopal Institute (SEI)**

21 Grosvenor Crescent, Edinburgh EH12 5EE

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### **Principal:**

Revd Canon Prof Mike Hull

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### **Director of Studies:**

Revd Dr Anna-Claar Thomasson-Rosingh

email: [DoS@scotland.anglican.org](mailto:DoS@scotland.anglican.org)

### **Director of Mixed Mode Training:**

Rev Dr Richard Tiplady

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## Procedure for Data Protection

The SEC Discernment process encourages transparency throughout the process. Enquirers and Candidates are encouraged to discuss fully at each stage assessments written about them.

During the process of discernment in the SEC files of written material are held in accordance with the General Data Protection Regulations (Data Protection Act 2018).

This information is kept securely, and the data is processed under the guidance of the Secretary General of the General Synod.

The PDO holds the completed files and information is shared between those involved in the SEC Discernment process: Diocesan Bishop, Assistant Director of Ordinands (ADO), Vocational Advisor (VA), Discernment Meeting Members, and Advisory Selection Panel Members. The data held will only be used for the purposes of the discernment of vocation in the SEC and subsequent training or formation for ministry.

All involved in the SEC Discernment process are acting provincially and the data controller is the General Synod of the Scottish Episcopal Church (Scottish charity number SC015962). Formal application by an individual to see data held about them can be made to the data controller.

Files will typically include correspondence, assessment reports, references, and special category data as defined by the Act (e.g., religious beliefs, details of personal biography, health, and any criminal record). The basis of processing of this data is “legitimate interest” and satisfies the GDPR Article 9 condition “legitimate activities”.

If an Enquirer is not sponsored to become a Candidate by a diocesan bishop their folder containing the initial recommendation form and VA assessment report will be held for 5 years in accordance with General Synod practice to facilitate a resumption of the discernment process if that is required. Any other documents collated in the process will be shredded or deleted.

If a Candidate is not sponsored for an Advisory Selection Panel (ASP) their folder containing the initial recommendation form, VA assessment report, Registration Form, and ADO assessment report will be held for 5 years in accordance with General Synod practice to facilitate a resumption of the discernment process if that is required. Any other documents collated in the process will be shredded or deleted.

Following an ASP, whether a Candidate is recommended or not for formation and ordination training, their folder containing the initial recommendation form, VA assessment report, Registration Form, ADO assessment report, Discernment Meeting report and ASP report will be held for 10 years in accordance with General Synod practice to facilitate a resumption of the discernment process if this is required. Any other documents, including Charity Trustee Declaration, Safeguarding Declaration collated in the process will be shredded or deleted. For those who are recommended and commence training and formation subsequent meeting notes with the PDO and or the Principal of SEI may be added.

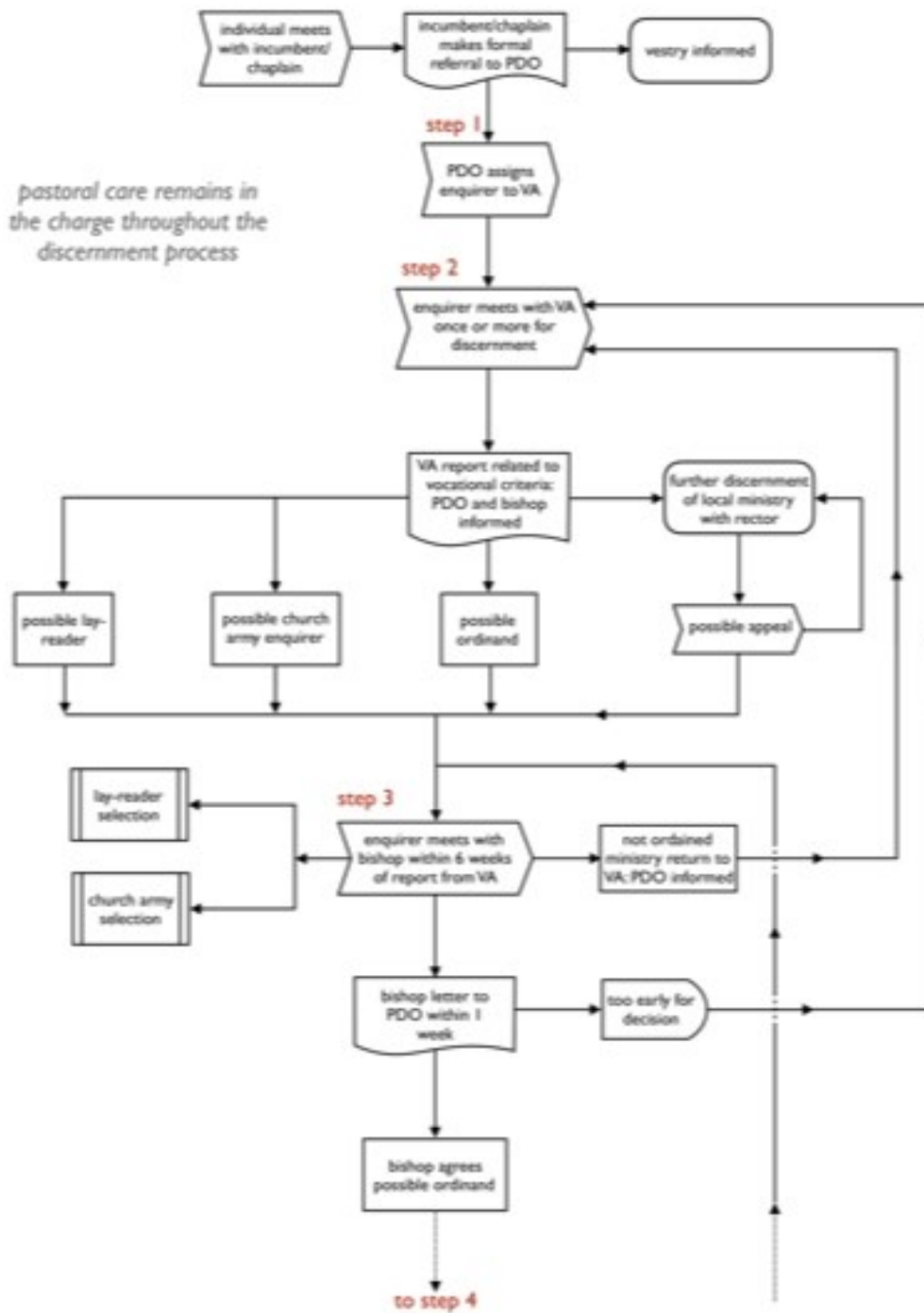
Enquirers/Candidates are asked to sign a form, for the PDO, indicating they understand the procedures and have received this information and consent to the processing of their data.

# Appendix 1: flowchart

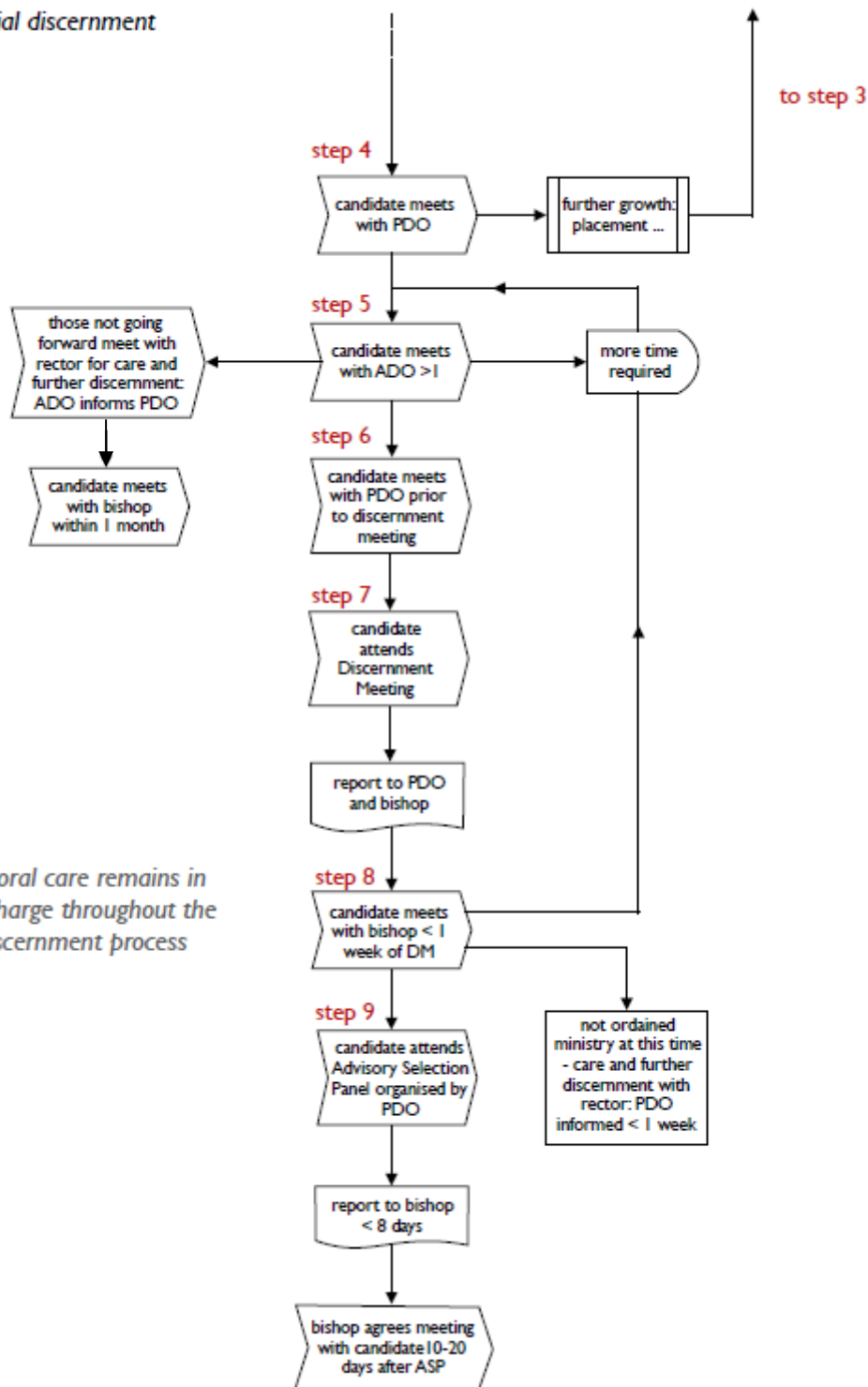
(this chart is also available as a single document on the website)

## Scottish Episcopal Church: Vocational Discernment Process

local discernment



provincial discernment



pastoral care remains in the charge throughout the discernment process



## Appendix 2: process *[as described on the website]*

### Discernment process for ordained ministry

In the Scottish Episcopal Church, final decisions about selection for training and then ordination to the diaconate or presbyterate are made by the candidate's diocesan bishop. However, the bishops involve others in the discernment process from the beginning.

#### Discernment in the congregation or chaplaincy

Individuals must be sponsored by their priest or chaplain, and normally will have discussed their sense of vocation with them for a time. The priest may or may not involve the Vestry (church council).

When the enquirer comes to the point of formal sponsorship, a reference from their priest is required. This reference is sent to the Provincial Director of Ordinands (PDO) for the process to begin. The Province is developing the role of a 'Vocations Advisor' who can help to discern what kind of ministry (e.g. Lay / ordained) the enquirer may be called to. The Vocations Advisor will inform the enquirer about the steps involved in the process of vocational discernment.

#### Discernment with the Vocations Advisor

The Vocations Advisor will have several meetings with the enquirer for up to about 18 months. During this time, the enquirer may be required to do reading and written work, undertake practical ministry, and broaden their Church experience. This begins the personal discernment by the enquirer as well as the Church valuing and validating the gifts of the individual.

Some dioceses require individuals to engage in group discussion about discernment and their vocation with their congregation or with other enquirers. The individual will normally meet with their diocesan bishop at least once during this time.

#### Discernment with the Provincial Director of Ordinands (PDO)

The process continues with the Vocations Advisor offering their report to the Provincial Director of Ordinands (PDO) and to the diocesan bishop on the enquirer's progress, related to general categories and criteria for discernment. The diocesan bishop interviews the individual and offers their own reflection to the PDO about their progress. The PDO meets the enquirer and decides the next most helpful step for them. (The PDO is appointed by the College of Bishops and advises them directly). The individual may be advised to return to the Vocations Advisor to aid personal development or the discernment of an appropriate ministry other than ordained ministry. Further elements of discernment may be included by the PDO, with reference to the diocesan bishop, before the enquirer may be considered a candidate suitable for ordained ministry. The next stage is for the candidate to meet a regional Assistant Director of Ordinands.

#### Criteria for Selection and Discernment Curriculum

The Criteria for Selection provide a framework and tool for the Discernment Process, Selection Panels, and the Scottish Episcopal Institute's (SEI) Formation Outcomes for ordinands. Conversations and reports are shaped around the Criteria. It is important for candidates to engage with the Criteria from an early stage. Candidates are to provide evidence for having fulfilled each Criterion. The Discernment Curriculum does not have the rigidity of a "course" but should be viewed as "accumulating a portfolio". Candidates are asked to undertake suggested reflections and activities. Details of the Criteria for Selection and the Discernment Curriculum are available from the PDO.

## Discernment with the Assistant Director of Ordinands (ADO)

An Assistant Director of Ordinands (ADO), with local ministry and mission expertise, assists the candidate through several meetings with the elements for further discernment. A Registration form is completed with the candidate, and the ADO makes evidence-based recommendations in a report based on the Discernment Curriculum to the diocesan bishop and PDO, as to whether the candidate progresses to a formal Discernment meeting, or not. The diocesan bishop reminds the candidate's priest of their ongoing pastoral responsibilities to those individuals whose discernment suggests vocational options for discernment other than ordained ministry.

## Discernment Meeting

The PDO is responsible for those candidates who are to attend a Discernment Meeting, consisting of two lay people and one clergy person from the Province. After interview, recommendations are sent to the PDO, and copied to the Bishop, about the candidate proceeding to an Advisory Selection Panel, or taking further time with the ADO to address identified issues. The diocesan bishop meets with the individual, in consultation with the PDO, to discuss the next steps. Personal or family circumstances can change significantly during the time of the whole vocational and discernment process so it may be possible for a recommendation to be made that the individual is not called to ordained ministry.

## Advisory Selection Panel

The Advisory Selection Panel, receiving the required reports and references from the PDO, is made up of experienced clergy and lay advisers, sometimes with a group of candidates. The Panel involves interviews, written work, and presentations. The PDO writes a full report of the Panel, based on the Advisors' written reports, for the candidate's diocesan bishop. Candidates may be recommended for training, not recommended, or conditionally recommended.

## Final decisions

The candidate's diocesan bishop decides what the candidate will do next on the basis of the various recommendations. In practice, they almost always follow the recommendations of the Panels.

At this stage, the candidate may begin training and formation with the Scottish Episcopal Institute. A final decision as to whether the candidate will be ordained is made at the completion of their Initial Ministerial Education, usually lasting three years.

## Appendix 3: The Care for Non Recommended Candidates

### following a Discernment Meeting and Advisory Selection Panel

The disappointment of a candidate who has not been recommended for training is often considerable, and candidates will react differently. The pastoral care of such candidates is therefore a sensitive matter and one in which the regional discernment team members should expect to play a crucial part.

This pastoral care is not, however, the responsibility of these team members alone. The candidate's recommending incumbent or chaplain will have much more frequent contact with them and therefore take responsibility for much of their continuing care.

However, it is not always right to expect incumbents to bear the burden of pastoral care entirely on their own. Mutual awareness of competing feelings, thoughts and potential actions should be considered by the local discernment team and the incumbent, as it is recognised that all involved may react in ways similar to the candidate: anger, frustration, bereavement, concerns for advocacy.

The individual candidate's continuing needs during discernment should be met by the appropriate people in discussion locally with the incumbent, ADO, and the VA who encouraged their initial discernment as a local enquirer. *In developing this policy for the care of non-recommended candidates it is envisaged the VA will have an enhanced involvement with all their regional candidates throughout the process to maintain trust and pastoral contact, liaising with the ADO and PDO when required.*

When furthering conversations about authorised lay ministry, the VA is an important local link person to the diocesan bishop: at the beginning of the discernment process, before candidature and to those not recommended for ordained or lay reader ministry at a Discernment Meeting or an ASP.

*This forms part of a regional and diocesan role for the VA especially supporting and affirming lay ministry with the local/provincial oversight and support given by diocesan bishops. The VA's role description will be required to be amended provincially and affirmed locally.*

The PDO, local discernment team, and incumbent will need to recognise their responsibilities and establish an effective partnership. To this end, the PDO will facilitate this partnership with the candidate, recommending incumbent, the ADO and VA during the candidature.

This may be especially necessary in the case of self-supporting candidates with strong local support for their candidature.

Consideration should be given to the quality of support candidates receive before attending an ASP.

As part of this care, a candidate's incumbent will be informed about the stages of the discernment and selection process and the outcomes so that they can offer appropriate support at the right time.

Independent formal spiritual accompaniment should be encouraged for all candidates by the PDO. Separate and distinct from the formal discernment process, this can act as a sounding board and reference point for the candidate throughout the process but especially exploring the implications of non-recommendation.

Whilst the discernment process is one that affirms the candidate throughout, care must be taken to communicate this affirmation in relation to the development of ministry. Affirming the candidate within appropriate boundaries is essential so that it cannot be misinterpreted as being entirely personal. For non-recommended candidates a sense of rejection by the Church can be avoided by affirming a continuing and developing lay ministry. Nevertheless, the importance of such affirmation does not preclude the voicing of any concerns that have arisen during the discernment process.

The PDO acts as the provider of information about the discernment and selection process for all involved, maintaining the integrity, values, and purposes of the discernment process. The use of independent counsellors/listeners or a psychological assessment can be facilitated at any stage for those referred by the diocesan bishop to the PDO.

With these general points in mind the following stages are suggested to help bishops, the discernment team, and recommending incumbents or chaplains in their care of non-recommended candidates:

- 1. The manner in which the decision is communicated should be considered carefully by bishops and organised before the date of the ASP. Pastoral focus is recommended by a face-to-face meeting rather than phone, Zoom calls or email correspondence. These should take place within a fortnight of the ASP. The candidate should be aware that there is no appeal. Questions about the decision need to be considered with the diocesan bishop. The decision rests with a candidate's bishop.*
- 2. It must be recognised that the candidate will find it difficult to absorb information at this initial stage. The PDO should contact the recommending priest, ADO. and VA to communicate the news of the Bishop's decision.*
- 3. After the decision, communicated to the candidate by their bishop, the PDO should offer careful debriefing based solely on the Criteria of Selection. The date for this face-to-face de-briefing should be arranged before the ASP.*
- 4. The ASP report will be given to the candidate by the PDO prior to the face-to-face meeting. A candidate may choose to have someone with them at this meeting. Those accompanying the candidate should be aware there is no appeal. The candidate will have signed the GDPR policy and know that all their documents within the process are available to them.*
- 5. Candidates should be reminded of the help available from a counsellor/listener.*
- 6. After three months it may be helpful to have another meeting to talk about how the candidate is coping with the decision, what has happened in the time since the decision, and what the process will be from then on. This should be facilitated locally by the VA for the Bishop with the recommending priest informed.*
- 7. It may be helpful for the recommending priest to formally meet with the candidate after six months to cover issues of redirection, the possibility of coming back for sponsorship to another ASP in a few years or letting go. The PDO should be informed of this concluding stage of the discernment process for the candidate.*

**Canon Ian Barcroft, PDO. Approved by College of Bishops March 2023.**



### **If a concerned observation is made to a Bishop, or the PDO**

The Bishop or PDO should contact the recommending Rector, VA or ADO and inform them which process is to be used: the local process described below or the formal process described diagrammatically, above. The PDO will communicate to the informant how their concerned observation is to be assessed.

**When “a Concerned Observation” about an Enquirer or Candidate is notified to a recommending priest, VA or ADO.** The PDO should be the contact person in relation to the SEC Discernment process and will be able to assist and advise. Consideration should be given as to the importance, at an early stage, of sharing the concerned information with the sponsoring bishop.

*The process outlined here does not include or refer to anything which is regarded as a Safeguarding issue. Safeguarding always takes precedence and should be dealt with by contacting the SEC Diocesan or Provincial Safeguarding Officer*

**Realistic expectations of confidentiality.** In order to enable best pastoral practice, it is necessary that before any part of the discernment process begins, some realistic expectations of confidentiality must be shared between the Enquirer or Candidate and either the VA, ADO, or the recommending Rector, e.g., "anything we say in this meeting is confidential unless I feel it would be harmful to you or others not to share the information."

**Possible pathways.** A “concerned observation” may be made about an Enquirer or a Candidate to a VA or ADO: (i) alone in conversation with the VA or ADO (ii) from the recommending Rector of the Enquirer or Candidate (iii) or from anyone else who decides to share their observation with either VA, ADO, Rector, Bishop or PDO.

**If the concerned observation is made by the Enquirer or Candidate (about their own actions) alone in conversation with the VA or ADO.** The VA or ADO should speak to the PDO in the first instance, in the knowledge that the observation will be shared with or has come from the Enquirer or Candidate. The Enquirer or Candidate should be told by their VA or ADO that the ‘concerned observation’ information will be shared with the PDO and their Bishop in the SEC Discernment Process. It is acknowledged that this may have an impact on the relationship between the VA, ADO, and the Enquirer or Candidate, and thought will be needed in terms of how to manage this pastorally. **Positive indicators.** It is important to realise that sharing a concerned observation at this stage should not be considered ‘the wrong thing to do’, as it may be a good indication of integrity, honesty, self -reflection and communication as part of the Criteria of Selection within the SEC Discernment process.

**If the concerned observation is made from the recommending Rector of the Enquirer or Candidate to the VA or ADO.** The recommending Rector, VA or ADO should speak to the PDO in the first instance, in the knowledge that the observation will be shared with or has come from the Enquirer or Candidate. The Enquirer or Candidate should be told by their VA or ADO or the recommending Rector that the ‘concerned observation’ information will be shared with the PDO and their Bishop in the SEC Discernment Process. It is acknowledged that this may have an impact on the relationship between the VA, ADO, or recommending Rector and the Enquirer or Candidate, and thought will be needed in terms of how to manage this pastorally.

**If the Concerned Observation is made by another party and shared with the VA, ADO or recommending Rector.** In the case of a third-party sharing information, they may disclose their

concerned observation with varying degrees of formality, e.g., email, telephone, by requesting a meeting, or even as part of a casual conversation at another event.

**Note: there should be no reassurance concerning confidentiality given to the informant unless the VA, ADO, recommending Rector feels it is justified. The recommending Rector, VA, ADO may wish to encourage the informant to meet with the candidate to resolve matters or may need to inform them that their concerned observation may be passed on to the Bishop or PDO. The passing on of this information escalates the ‘concerned observation’ to the process outlined diagrammatically. The PDO will explain to the informant the process.**

If the concerned observation is made by an informant to the recommending Rector, the question to be asked is whether this can be satisfactorily handled locally, and whether it should involve the Enquirer or Candidate at this stage, before bringing it to the attention of the VA or ADO, and vice versa if first raised with a VA or ADO, even if the concern is frivolous.

An initial personal assessment may be done by the VA, ADO or recommending Rector as to the nature of the concerned observation. The anonymity of the informant should be protected at this stage, if at all possible. It may be that a little further inquiry is necessary before a concern should be resolved as relevant, or not, to the discernment process. The recommending Rector or VA and ADO may assure themselves that it is not in fact a concern and that there is no evidence to take it further. If this is the case, the candidate need not be informed.

If there is seen to be no concern, but the VA, ADO wish to include the issue in their assessment report the Enquirer or Candidate must be informed. This may have repercussions for the continuing relationship of candidate and informant, especially if the anonymity of the informant cannot be protected, so the pastoral requirement needs to be handled carefully. In this instance, concern should be taken by the recommending Rector, VA, and ADO about how to resolve the concern of the informant in a pastoral way, either by enabling them to raise the issue with the candidate in a spirit of loving truthfulness, or by meeting with them to discuss any pastoral issues they have which caused them to make the concern. The approach taken will depend on the necessity for reporting the issue, the anonymity of the informant, and the transparency required with regard to the Criteria of Selection for the Enquirer or Candidate.

If the matter is not to be reported and the candidate not informed, the informant should be reassured the VA, ADO, or recommending Rector do not feel their concern is a bar to further vocational discernment for the Enquirer or Candidate.

If the VA, ADO, or recommending Rector is not able to satisfy themselves after this meeting that there is no concern with respect to the Enquirer or Candidate, then they should meet with the Enquirer or Candidate to discuss it whilst the informant’s anonymity is protected. They may invite the Enquirer or Candidate to have their own third party to attend the meeting if they wish. If this issue of concern cannot be dealt with by the VA, ADO or recommending Rector, then the PDO should be informed, and the formal process described diagrammatically will be followed.

Details of any discussion with an Enquirer or Candidate following a ‘concerned observation’ as part of the ongoing discernment process should be disclosed when the assessment report is sent to the PDO for the sponsoring Bishop with the agreement of the Enquirer or Candidate, describing the process and how it is being resolved with the assistance of the Enquirer or Candidate. If agreement cannot be met about this reporting, then the formal process described diagrammatically, may be considered by the PDO with the consent of the sponsoring Bishop.



If anonymity cannot be protected, the informant and the Enquirer or Candidate should be encouraged to meet to resolve any issues they have, either by the recommending Rector, VA, or ADO. Again, confidentiality should be used judiciously, so that honest communication can flow to aid reconciliation. The free flow of gossip or hurtful comments should be avoided at all costs.

**Canon Ian Barcroft, PDO.** Approved by College of Bishops March 2023.