



**The Committee on Preparation for Ministry  
Operations Manual for Teaching Elders /  
Ministers of Word & Sacrament**

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**Note: portions of the CPM Operations Manual have been taken from the Advisory Handbook on Preparation for Ministry in the Presbyterian Church (USA) Operations Manual for the Committee on Preparation for Ministry.**

# Introduction

## Key Concept

The preparation for ministry process is grounded in an understanding of Christian vocation as a response to God's preeminent grace which calls all Christians to ministry, whatever their occupations. Some among them are called by the Holy Spirit, through the church, to ministry of the Word and Sacrament. The process through which this call of the individual by Spirit through the church is confirmed is built upon four key concepts.

## Covenant

Covenant relationships acknowledge that the Christian community's primary commitment is to God. In the context of this commitment to and covenant relationship with God, the inquirer or candidate and the representatives of the session and the presbytery negotiate between themselves additional covenant agreements. These agreements affirm their mutual responsibility and provide the means for planning and evaluating the inquirer's or candidate's progress in more clearly discerning their call and in preparing and developing their gifts for the ministry of the Word and Sacrament. The resulting ongoing relationships take seriously the unique background, experience and personal attributes that each person brings to the process. They enable the sharing of deep convictions, an enhanced understanding of the demands of ministry, and the self-evaluation that is essential to the process. Professional and spiritual guidance and personal support develop naturally within the context of such relationships.

## Consultations

The purpose of consultations is to help a presbytery work with the individual at her/his current level of achievement and, through guided conversations and the mutual negotiation of new learning covenants, to stimulate further development in specific areas. Consultations between the inquirer or candidate and the representatives of the session and the presbytery are based on specific goals in five areas of growth and on specific "expected outcomes" for both the inquiry and candidacy phases:

- ***Education for Ministry***, which includes evaluation of the individual's academic potential and progress, and reflection on their educational experiences in relation to their preparation for ordered ministry as a teaching elder.
- ***Spiritual Development***, which provides a framework in which individuals can reflect on their personal faith journey and their spiritual practices to discern the will of God in their lives.

- ***Interpersonal Relations***, which provide opportunities to reflect on how one relates to others, one's leadership style, and what they mean in terms of the functions and responsibilities of the ministry of the Word and Sacrament.
- ***Personal Growth***, through which persons reflect on who they are, what areas they need to develop, how to understand their call, and how to develop personal stewardship.
- ***Professional Development***, to help persons develop specific skills that will enhance their effectiveness as teaching elders and as presbyters, especially in the areas of understanding one's ministry context and the ability to deal with conflict that may emerge in ministry settings where one serves.

## Connectionalism

Shared mutual accountability characterizes the preparation for ministry process.

- **The Pastor and Session** are responsible for helping members of the congregation understand what Christian vocation means. They are expected to provide the context within which individuals can discern the call to the ministry of the Word and Sacrament and understand the nature of this ministry. They help inquirers evaluate the suitability of their gifts and provide pastoral care and support during the preparation for ministry process. Acting as advocate for the inquirer or candidate, the session, through its moderator and presbytery commissioner(s), can call the presbytery to accountability in fulfilling its responsibilities.
- **The inquirer or candidate** shares responsibility for her/his movement through the process and for planning for evaluating her or his growth.
- **The Presbytery** through its representatives assigned the responsibility to care for those in the preparation for ministry process provides pastoral care, guidance, support and evaluation of inquirers and candidates. The final responsibility for the preparation process resides with the presbytery.
- **Theological institutions** provide academic, field education and professional resources in the guidance and educational development and evaluation of inquirers and candidates.

At the conclusion of the preparation process, the responsibilities of examination and ordination are shared by both the inquirer's or candidate's presbytery of care and the presbytery of call. Having guided and evaluated the candidate's progress through the cumulative series of consultations, the presbytery of care meets with the candidate in a "final assessment" of her/his readiness to receive a call (G-2.0607). When a call is extended by a church either within that presbytery or another, the presbytery of call ordinarily has the responsibility of examining the candidate for ordination and then ordaining and installing him/her in that ministry (G-2.0702).

The preparation for ministry process is one of continuing development. By providing a supportive community in which the inquirer or candidate assumes increasing responsibility for decisions made throughout the process, it introduces him or her to skills for self-development, goal-setting and self-evaluation. The individual is encouraged to develop these skills into conscious, disciplined planning for personal and professional growth that should continue throughout his or her ministry.

### **The Process – Inquirer and Candidate**

The *Book of Order* requires that of the total time spent in the preparation for ministry process is at least two years with “at least one year as a candidate” (G-2.0602). Like other requirements, this distribution of the time between inquiry and candidacy as well as the requirement of an overall period of two years under care may be waived by a three-quarter vote of the presbytery (G-2.0610). But again, no one’s interests are truly served by rushing people through the process before there is a clear understanding of their suitability, fitness and readiness for a call to ministry requiring ordination as a teaching elder.

## **Inquiry Phase**

The purpose of the inquiry phase is to provide opportunities for the church and for those who believe they may be called to ordered ministry as teaching elders to explore and test that call together. To make this exploration as effective as possible, a network of caring, supportive relationships is initiated—first, between the inquirer and the church session, then with the Presbytery’s Committee on Preparation for Ministry (CPM) who oversees the individual’s preparation for ministry. In regular consultation with the presbytery’s CPM, inquirers evaluate the personal implications of and their suitability for a vocation as a teaching elder; are guided in prayerful examination of their motivations, personal faith and experience in congregational and other ministry settings; and make a serious assessment of the gifts needed by teaching elders comparing them with their own gifts. This phase also provides the church with opportunities to respond directly to the inquirer’s questions and concerns about the role and responsibilities of a teaching elder.

### **Admission to Inquirer Status**

A member of a congregation may be considered for enrollment as an inquirer by approaching the session about her/his desire to engage with the church in a process of discernment regarding the possibility of becoming a teaching elder. In making the decision about whether to endorse the individual for the inquiry phase, it is advisable for the session to consult with the person not only about his or her personal sense of call but also about what gifts and abilities for ministry the session has observed during the person’s involvement with the congregation. The session will request a member of CPM to communicate with them in order to be appraised of the session’s responsibilities involved in their endorsement and their continuing responsibilities & support of the member enrolled in this process of preparation for ministry. Unless an exception has been approved by the presbytery (see G-2.0610 and “Exceptions” below), the individual must have been “active in the work and worship of [the]

congregation for at least six months” and be a member of the congregation before the session presents its endorsement to CPM.

The individual seeking to be taken under care by CPM will complete an application form provided by CPM consisting of three parts:

- ❖ **Form 1A** – Background Information
- ❖ **Form 1B** – Questions for Reflection, and
- ❖ **Form 1C** – Financial Planning for Theological Education.

Upon review of the applicant’s responses, if the session agrees that their endorsement is warranted, it will complete

- ❖ **Form 1D** – Session Evaluation and Recommendation and forward all four forms to CPM.

In addition, the session will appoint an elder (either one serving on session or one who served previously) as this individual’s Session Liaison. The liaison will maintain contact with the individual during their time of preparation for ministry providing counsel, support and reports to the session.

The vote of session to endorse the individual’s application to come under care will initiate their assistance of that individual in beginning a formal process with the Committee on Preparation for Ministry. Upon receipt of the session’s endorsement, CPM will need to make a decision regarding whether to enroll the person as an inquirer. CPM will conduct its own interview with the person and the Session Liaison. Upon the completion of this interview CPM will vote on whether or not to grant inquirer status to the individual.

Official enrollment as an inquirer is an action by the Presbytery. This authority has delegated the Committee on Preparation for Ministry. This process is intended to be a thoughtful and deliberate step. Individuals are encouraged to take this formal action to seek inquirer status soon after they have made their personal decision to explore this ministry so that CPM can provide them with support and counsel as early as possible.

By way of acknowledging this mutual relationship with CPM, the new Inquirer will complete:

- ❖ **Form 2A** – Report of Consultation Regarding Application to Become an Inquirer” listing agreed to growth goals in the first year of inquiry, and
- ❖ **Form 2B** – Covenant Agreement and Inquirer Release” confirming the new covenant relationship between the Inquirer, the session and CPM and which gives permission to CPM to secure information necessary to make responsible decisions and recommendations.

## **During the Inquiry Phase**

The date of CPM's action to enroll the person as an inquirer marks the beginning of the covenant relationship for the purposes of the constitutional time requirements (a minimum of two years with at least one year as a candidate - G-2.0602). The inquiry phase should be of sufficient length for the inquirer, the Session, and CPM to formulate a decision regarding the inquirer's suitability for ordered ministry. The inquiry phase is a period of asking questions openly and honestly:

- What are the gifts for ministry that others recognize in the person's life?
- Where might those gifts fit in response to the needs of the church and God's people broadly in the world?
- What are the functions that, within the Reformed tradition, distinguish the ministry of Word and Sacrament from other forms of ministry such as the ordained service of deacons and ruling elders?
- Does the inquirer have the gifts, temperament, and interests that would enable her or him to fulfill those functions of ministry of Word and Sacrament?
- How willing and able is the person to follow the call of God's Spirit to serve in this ministry wherever that may lead?

Presbyteries are also encouraged to widen the consultations beyond just conversations between the inquirer and committee members. The seminary or institution of theological education possibly being attended by the inquirer will likely have important insights into his or her aptitudes and developing gifts for ministry. Receiving reports from the Presbyterian Church (USA) Theological Institution Contact person at these schools can provide information that goes well beyond what may be found in a transcript. Similarly, reports from those who are supervising an inquirer's field education assignments or other supervised practice of ministry programs will be invaluable.

## **Choosing a Seminary**

One of the important factors in preparing for ministry is the seminary which the Inquirer chooses to attend. The seminary provides the academic preparation required for becoming a Teaching Elder. The CPM will discuss with each Inquirer their choice of seminary and how that seminary's curriculum will benefit the student. Refer to the CPM policy on "Choosing a Seminary and Academic Course Requirements" for guidance regarding the choice of a seminary, general education requirements and learning goals that address competency goals.

## **Learning Goals for Inquirers**

Over the years, many Presbytery committees and inquirers have found it helpful when making a determination about whether or not there is the potential to be a

candidate for Teaching Elder to review six specific areas. These particular areas have been referred to in the past as “outcomes of inquiry.”

- The inquirer should be able to articulate an understanding of Christian vocation in the Reformed tradition and how it relates to his or her personal sense of call.
- She/he should be able to express their personal faith in a manner that demonstrates an understanding of the Reformed tradition.
- He/she should be able to expound upon at least one concept from that personal faith statement at greater depth explaining what it suggests about God, humanity, and their inter-relationships.
- The inquirer should be able to explain what it means for them to be Presbyterian, indicating how that awareness grows out of participation in the life of a particular church.
- She/he should be able to discuss their personal and cultural background as it relates to the ministry of Word and Sacrament, including a concern for maintaining personal spiritual, physical, and mental health. Inquirers should also be able to relate their own personal cultural location to changes in American society and its increasingly multicultural character.
- He/she should be able to express their understanding of the tasks teaching elders perform, including expression both of his or her specific gifts for this particular ministry and of areas in which further growth is needed.

Annual consultations throughout the inquiry phase provide opportunities for the inquirer to demonstrate these abilities and others that CPM believes are indications of suitability for ministry. These consultations may also suggest other specific tasks that might be relevant in the determining a particular inquirer’s suitability for ministry. To this end the inquirer and their session liaison will meet with CPM annually to review progress on goals established previously and update information on academic status.

Prior to the annual consultation the inquirer will complete

- ❖ **Form 3** – Pre-Consultation Report on Development Areas providing personal contact information, reflections on the year past and goals for the coming year.

Following the interview CPM will complete

- ❖ **Form 4** – Report on Consultation reporting the inquirer’s developmental progress seen and growth goals it believes helpful for the inquirer in the coming year.

This report is sent to the inquirer, their theological institution and the sponsoring session.

## **Career Assessment**

During the inquiry phase the inquirer will undergo a career assessment interview with an approved program. The purpose of this assessment is to evaluate the person's suitability for ministry by identifying strengths and areas of needed growth and to give valuable insight to the inquirer as he or she progresses through their preparation for ministry. The expense of this career evaluation will be paid 1/3 by the inquirer, and 1/3 by CPM who will ask the sponsoring church to contribute about 1/3 of this program cost.

## **Bible Content Exam**

During the preparation for ministry every person under care is required to successfully pass five nationally given exams required of all inquirers/candidates – the Bible Content Exam and four ordination exams. It is expected that an inquirer will successfully pass the Bible Content Exam prior to their application to move to Candidate status.

# **Candidacy Phase**

*The purpose of the candidacy phase is to provide for the full preparation of persons to serve the church as teaching elders. This shall be accomplished through the Presbytery's support, guidance, and evaluation of a candidate's fitness and readiness for a call to ministry requiring ordination. G-2.0604*

A presbytery's decision to move an individual from inquiry to the candidacy phase indicates a communal discernment of that person's suitability for ordained ministry as a teaching elder. So in the candidacy phase the primary focus shifts to providing for the candidate's "full preparation" and conducting a formal assessment of her/his "fitness and readiness for a call to ministry requiring ordination" as a teaching elder. The covenanting process of setting goals through genuine consultation between the presbytery and the person under care that was begun in inquiry continues in the candidacy phase. However, the *Book of Order* makes it clear that particularly in the candidacy phase it is the presbytery's responsibility to provide "support, guidance, and evaluation" (G-2.060) to the candidate.

The candidates' responsibility, then, is not just to keep their presbyteries informed about their progress through theological education, supervised practice of ministry, and so forth, but to follow their presbytery's *guidance* as to how they should be preparing for a potential call as a teaching elder through developing their gifts for ministry and evaluating the progress of their development. The presbytery's responsibility also includes the *evaluation* of when the candidate has made "full preparation" and is ready to be considered for a call to service as a teaching elder.

## **Entering the Candidacy Phase**

An inquirer becomes a candidate by an action of Presbytery. In accord with its responsibilities in the *Book of Order*, each presbytery “shall develop and maintain mechanisms and processes” (G-3.0307) for when and how a decision is to be made about an inquirer’s “suitability for ministry” and whether to move that person to candidacy.

The following actions and forms shall be followed to move into the candidacy phase:

- ❖ **Form 5A** – Application to be enrolled by presbytery as a Candidate: this form is completed by the Inquirer seeking to be advanced to candidacy. The recommendations of the session and CPM together with the action taken by presbytery are recorded on this form
- ❖ **Form 5B** – Session evaluation and recommendation for Candidacy: this form is completed by the inquirer’s session and forwarded to CPM together with Form 5A. The session is asked to attach a letter to the form explaining its rationale for recommending Candidacy in light of the inquirer’s “suitability for ordered ministry.” (G-2.0603)

#### **Appearance and Approval before Presbytery:**

The person recommended for candidacy appears before presbytery & may respond to questions in three areas: their Statement of Motivation for Ministry (distributed in the Mailed Docket), their spiritual journey and their work in the church. Upon a successful vote of approval the candidate is welcomed and a special service for “Receiving a Candidate under Care” is conducted. (See *Book of Occasional Services* [Louisville: Geneva Press, 1990], pp. 270-271). The service focuses on new candidates’ public declarations that they believe themselves called to this ministry and that they will accept the presbytery’s supervision and determination of their “full preparation” for the ministry.

#### **Following Presbytery Approval:**

- ❖ **Form 7A** – Changing Relationship of Care with the Presbytery – completed by CPM Moderator to signify a change in the relationship between the person under care and the presbytery.
- ❖ **Form 5C** – Report of Consultation Regarding Application to Become a Candidate: this form contains a signed acknowledgement of the new covenant relationship entered into by the candidate, CPM and the Presbytery. In addition, growth areas for the candidate are enumerated which will be reviewed in subsequent consultations. The completed report is sent to the candidate, the candidate’s theological institution and the sponsoring session.
- ❖ **Form 5D** – Covenant Agreement and Candidate Release: a signed acknowledgement of the new covenant relationship entered into by the candidate, the session and CPM. The candidate release sets in motion an understanding that permits CPM to secure information necessary to make responsible decisions and recommendations.

## During Candidacy

The covenant relationship between the candidate and the presbytery continues to be expressed through the regular pattern of consultations begun during inquiry, but with specific attention given to the “support, guidance, and evaluation” of the candidate’s progress in the developmental areas of preparation for ministry. The following forms will continue to be used for annual consultations:

- ❖ **Form 3** – Pre-consultation Report On Development Areas: this report, completed by the candidate before each consultation, evaluates progress in accomplishing previously agreed-upon goals and objectives. The form requests a listing of completed courses and includes questions to be addressed in each of the five growth areas.
- ❖ **Form 4** – Report on Consultation: this is a summary report of the consultation completed by CPM and the candidate. It indicates developmental progress in the five key areas along with growth objectives agreed to for the next year. The completed report is sent to the candidate, the candidate’s theological institution and the sponsoring session.

During these consultations, previously established goals will be assessed and appropriate new goals negotiated. The presbytery may include in these consultations reports from the candidate’s session and seminary, and any persons involved in overseeing the candidate in supervised practice of ministry. Such reports might be submitted in writing, but are especially helpful when presented personally so that follow-up questions may be considered.

CPM will ask candidates to prepare these written reports for distribution in advance of consultations to enable both the candidate’s and CPM’s preparation for the meeting. While it is desirable to conduct consultations in person, the use of video conferencing or telephone are in order to keep the relationship fresh.

During each consultation an explicit decision should be made regarding whether to continue the candidacy, especially if it becomes clear that adequate growth is not taking place. The *Book of Order* specifically states that presbyteries are to provide “support, guidance, and evaluation” of candidates under their care. Evaluation tends to come easy through determinations about candidates’ “fitness and readiness.” That said, candidates are much more likely to be open to receiving the Presbytery’s evaluation if they believe they have been supported and guided throughout the process.

Specific examples of support might be:

- Continue relationship-building through regular and frequent consultations.
- Financial assistance with expenses related to educational requirements (seminary, clinical pastoral education programs, etc.) and standard ordination exams.

- Mentoring through the presbytery, field education supervisors, or home congregation.

Specific examples of guidance might be:

- Academic advising and course selection from the Presbytery as well as the seminary.
- Field education site selections that both test and stretch the candidate's sense of call as well as being demographically outside of the candidate's prior experience.
- Extra-curricular requirements such as clinical pastoral education, personal counseling, spiritual direction, etc.
- Field education in a church or an institution where ministry opportunities are endemic (hospital, etc.) normally occur in a person's second or third year of seminary. These field education sites are normally planned and supervised by the seminary. However, consultation by the candidate and CPM in arranging these sites is encouraged in order to ensure that such ministerial opportunities continue to prepare the candidate for ministry.
- Clinical pastoral education experiences are required of the candidate and normally take place in the person's senior year in seminary. It is the responsibility of the candidate to seek out and apply to accredited clinical pastoral locations. Approval of such sites is required by CPM. Scholarship assistance is available for associated expenses and must be applied for by the candidate and approved by CPM.

### **Deciding about "Fitness and Readiness"**

The constitutional requirements for determining a candidate's "fitness and readiness" to be considered for a call requiring ordination as a teaching elder are laid out in G-2.0607, "Final Assessment and Negotiation for Service". Thus, candidates must show evidence of their fitness and readiness by the following:

- Showing wisdom and maturity of faith, leadership skills, compassionate spirit, honest repute and sound judgment
- A transcript showing graduation, with satisfactory grades, at a regionally accredited college or university
- A transcript from a theological institution accredited by the Association of Theological Schools acceptable to the presbytery, showing a course of study including Hebrew and Greek, exegesis of Old and New Testaments using Hebrew and Greek, satisfactory grades in all areas of study and graduation or proximity to graduation

- Satisfactory grades, together with the examination papers in the areas covered by any standard ordination examination approved by the General Assembly [currently Bible Content Exam, Reformed Theology, Worship and Sacraments, Biblical Exegesis & Polity]. Such examinations shall be prepared and administered by a body created by the presbyteries [currently this is The Presbyteries' Cooperative Committee on Examinations for Candidates (PCC)]

### **Certified Ready for Examination, Pending a Call**

The committee's decision to certify a candidate "ready for examination for ordination, pending a call" is based on prayerful reflection, review of the covenanted goals negotiated with the candidate, and on their mutual discernment that God has called that person and that he/she has adequately prepared by developing personal gifts for ministry in response to that call. When conducting final assessment and certifying candidates ready to seek a call, it is important for the Presbytery's committee to give attention to, and prepare the candidates for, some common issues faced in one's first-call:

- Continuing development of one's self-understanding in the role of pastor
- Understanding the congregation they will serve in terms of its history, ethos, programs, and status in the community, and in relation to the denomination
- Establishing an appropriate pastoral relationship style for the specific ministry context
- Dealing with conflict that may emerge in the congregation or ministry setting

The candidates should be reminded of resources and programs available to them as newly ordained pastors, including new pastor seminars, seminary debt assistance programs, presbytery mentor programs, and pastor support groups. The presbytery's committee needs to take a formal action to grant this "certification of readiness" and to report this action to the presbytery. This certification will need to be attested both in order for the candidate to be referred for possible ministry opportunities through the Church Leadership Connection and to any presbyteries reviewing whether to recommend approval of a particular call to ministry requiring ordination as a teaching elder.

Certification and final assessment by CPM is accomplished with the following:

- ❖ **Form 6** – Summary Report of Final Assessment: this form, completed by CPM, acknowledges that CPM has conducted a final assessment of the candidate's preparation and readiness to begin ministry. It certifies that she/he has successfully completed all of the denomination's and CPM's requirements and so is ready to be examined for ordination pending a call
- ❖ **Form 7A** – Changing the Relationship of Care with the Presbytery: this form signifies that the person under care has been certified ready to receive a call.

It should be remembered that “certification of readiness” does not end the covenant relationship between the candidate, the session, and the presbytery. The Session remains responsible to provide “concern and discipline” for the candidate, and the Presbytery, through the CPM, continues to provide “support, guidance, and evaluation” as the candidate seeks a first call.

It is important, then, to remember that “certification” may be accompanied by a renewed covenant outlining steps that the candidate will take to find the place of ministry to which the Spirit is leading and to maintain the skills for ministry developed during the preparation process, and the ways the session and presbytery can remain partners in discerning God’s call for the person still under their care. A person seeking a call to church ministry will complete a Personal Information Form and, upon its completion, forward it to CPM for review and approval. Upon CPM’s approval of the PIF the candidate will send it to the Church Leadership Connection in order to have it posted on-line for access by churches seeking pastoral leaders. CPM must give its approval to CLC when queried before it is posted on-line.

## Other Provisions

### Exceptions

The *Book of Order* permits a Presbytery, by a three-fourths vote, to waive any of the constitutional requirements for ordination as a teaching elder except those of any standard examinations approved by the General Assembly. As with the presbytery’s ability to approve a person to “negotiate for service” prior to “certification of readiness for examination for ordination,” this area will require some clarification from the 220th General Assembly as to whether a past “authoritative interpretation” applies to this provision of the Form of Government [for additional guidance see *Advisory Handbook on Preparation for Ministry in the Presbyterian Church (USA) - 2011, p. 50*]

The *Book of Order* does not allow a presbytery to “waive” the standard ordination exam requirements of G-2.0607d, but that does not mean that every candidate must receive “satisfactory” evaluations on all those examinations. By the same process required for other exceptions, a presbytery may approve an “alternate means by which to ascertain the readiness of the candidate for ministry in the areas covered by the standard ordination examinations” (G- 2.0610). This provision is a recognition that written examinations are not an appropriate means by which to assess ministry competence for some individuals. But that the exam requirements may not be “waived” (as other requirements can) is a recognition of the important role the exams play in the assessment of a candidate’s readiness to begin ministry precisely because they are not judgments (whether positive or negative) shaped by previous experience during the preparation for ministry process.

There are many issues to consider surrounding “alternate means” assessments of competency in the areas of the standard examinations (ranging from what

accommodations can be granted within the structure of the standard exams themselves to possible models for alternative assessment). The Office of Preparation for Ministry has worked with the examinations committee and disabilities advocates within the denomination to develop a separate training resource to advise Presbyteries and candidates about these possibilities. It is available on the Office's website as an online presentation entitled, "*Alternative Assessment of Competency*." A written version of this guidance can be accessed via the Internet at:

<http://www.pcusa.org/media/uploads/prep4min/articulate/alt-exams/player.html>

***When considering exceptions, decisions should be informed by the principle of focusing more on outcome rather than process.*** Individual customization should consider both the candidate's path to this point and the endpoint goal.

### **Removal from Covenant Relationship**

Inquiry and candidacy continue until the Presbytery acts in one of three ways to end the covenant relationship and remove the person's name from its roll of inquirers and candidates:

- Once a candidate who has been "certified ready for examination for ordination" receives a call approved by a Presbytery and has been examined, ordained and installed, the presbytery of call notifies both the session and Presbytery of care to remove the person from the membership roll of the congregation and the roll of inquirers and candidates of the Presbytery of care
- Persons under care as either an inquirer or a candidate may withdraw from the process by notifying their session and CPM. Such decisions may be arrived at mutually through the consultations and covenant reviews that are the core of the preparation for ministry process
- The presbytery or CPM may act on its own to end the covenant relationship because it has determined that an inquirer is not suitable for ordered ministry as a teaching elder or that a candidate's continuing preparation would not result in a determination of "fitness" and "readiness." If a person is removed from the process by CPM it must report its action to both the session and the Presbytery at their next respective meetings. For inquirers and candidates currently enrolled in theological studies, notification of this action should be sent to the candidate's seminary as well. When this action is contemplated or taken for additional guidance refer to *Advisory Handbook on Preparation for Ministry in the Presbyterian Church (USA) - 2011, p. 52,53*

### **Ordination**

The Presbyterian Church (USA) is firmly grounded in the Reformed tradition in its relationships with men and women who feel themselves called by God to be teaching elders engaged in the ministry of the Word and Sacrament. Foundational to a Reformed theological understanding of call is that the inner and personal call of the Spirit to an individual will always be affirmed by the community of God's people. In

a sense, then, the final and decisive assessment of a person's suitability, fitness, and readiness for ordered ministry as a teaching elder will be the acceptance of the call of a community to come and provide for them the functions of the ministry of Word and Sacrament.

Yet even that call from a faith community to an individual is still not quite enough. Because ordination "is an act of the whole church," the broader community still has a role to play through the affirmation of the call and the examination of the candidate by the presbytery responsible for that community. This presbytery of call, even if it has also been the presbytery of care, must act to confirm its discernment that God is indeed calling and has prepared this individual to serve within that particular ministry context at this particular moment.

Especially when the first call is in a different presbytery than the presbytery of care, it is unlikely that the candidate will know all the processes for establishing a first call in the presbytery where that call is located. Since the presbytery of call ordinarily has the responsibility to "examine, ordain, and install the candidate" (G-2.0702), the Committee on Ministry should meet with the candidate to discuss the process for conducting the presbytery's examination for ordination. It can further assist the candidate by:

- Helping her/him to prepare for the examination by posing sample questions to see how she or he responds and provide feedback on the responses' content and style.
- Consider rehearsing the examination process with the candidate in the setting where the examination will be conducted to provide a better feel for the reality of the process.

There may be occasions when for practical reasons the presbytery of call may request or permit the Presbytery of care to conduct the examination and ordination on its behalf. For example, it may be that a congregation calls the candidate only days after a presbytery meeting, and that presbytery will not be meeting for several months. It might benefit the ministry of both the congregation and the presbytery of call if the schedule of the presbytery of care could facilitate the examination and ordination at an earlier date. It is doubtful, however, that circumstances would arise where it would make sense for anyone other than the presbytery of call to conduct the installation service. Both the services of ordination and installation (if they are separate services) are services of the presbytery and are to be conducted according to the provisions in the Directory for Worship:

- Commissions for ordaining and installing (two commissions if the services are separate) must be formed and endorsed by the Committee on Ministry and then approved by a vote of presbytery.
- The candidate being ordained or installed normally is responsible for forming these commissions

- Each commission must have a moderator, at least three ordained clergy from different churches and at least three elders from different churches. Clergy members of the commission who are not members of the presbytery may be enrolled as Corresponding Members
- Once the ordination and installation have been completed, the stated clerk in the Presbytery of call is to notify the Office of Preparation for Ministry in the Office of the General Assembly, the presbytery of care and the candidate's home congregation that she or he is now a member of the presbytery of call.
- Upon receipt of that notification, the session of the congregation is to remove the person from its roll of active members and the presbytery of care will remove her or him from its roll of inquirers and candidates.

## **Policies and Guidelines**

### **Choice of Seminary in Preparing for Ministry**

One of the important factors in preparation for ministry is the seminary, which provides the academic preparation required for the ministry of the Word and Sacrament. To this end, the Committee on Preparation for Ministry will discuss each person's choice of seminary and how that seminary's curriculum will benefit the inquirer/candidate. In accordance with the *Book of Order*, the seminary must be certified by the Association of Theological Schools in the United States and Canada and acceptable to the presbytery. Approval of attendance at a particular seminary for one Inquirer/Candidate will not serve as precedent or assurance of similar approval for another Inquirer/Candidate. Each Inquirer or Candidate's choice of a seminary will be evaluated individually by the CPM. Inquirers should be prepared to answer the following questions:

- Describe how your research of theological schools informed you in making a seminary selection.
- What are the specific reasons you chose your seminary?
- How will the seminary you selected strengthen your identity and professional functioning as a future Presbyterian pastor?

Inquirers/candidates who choose, and are approved by CPM, to attend a non-Presbyterian seminary may be required to supplement their education with Presbyterian related studies as directed by the Committee on Preparation for Ministry. Inquirers who have already matriculated are asked to evaluate seriously what competencies on the following list may not be covered by required courses at their school, and then propose to CPM a plan for how they will work toward *those* competencies-- through elective courses, extra courses online or at another seminary, workshops/seminars, or etc. Finally, an inquirer who enters the CPM

process late in his or her seminary studies may be required to take additional courses after graduation.

### **General Educational Requirements**

Each candidate for ordination must include in his/her seminary studies the courses listed below, or their equivalent. The CPM reserves the right to require specific additional courses, in order to correct deficiencies in a student's undergraduate or graduate program. In addition, candidates must complete at least one year of field education, and are urged to consult with the CPM in their selection of a field education site. The CPM reserves the right to require a full-year internship of selected candidates. Candidates are also required by Geneva Presbytery to complete a basic unit of Clinical Pastoral Education (CPE) in a hospital setting. CPE does not replace the field education requirement.

Courses required by the Presbytery of Geneva are:

- Hebrew
- Old Testament Survey – to include history and the prophets
- Old Testament Exegesis (may be the second term of Hebrew)
- Greek
- New Testament Survey – to include the Gospels and Epistles
- New Testament Exegesis (may be the second term of Greek)
- Ethics
- Church History
- Reformed Theology/ *Book of Confessions*
- Preaching
- Christian Education
- Pastoral Care and Counseling – to include family needs and dynamics
- Presbyterian Church (USA) Polity
- Reformed Worship and Sacraments
- Leadership and Administration

### **Learning Goals**

During your seminary studies you should take courses that ensure that you have gained all of the following competencies at a basic level. These describe areas of competency, several of which may be gained within a single course. You and your CPM liaison should review your course syllabi and relate course objectives to this competency list to be sure that everything is covered in the course of your M.Div. studies. This relationship must be clearly demonstrated to the CPM.

**(NOTE: We do not expect that every PC (USA) clergy person will possess all of these skills in equal degree or at an advanced level, but we do expect that they will be exposed to these areas with a basic level of knowledge and become aware of areas in which further growth or education will be necessary.)**

### **Biblical Studies Learning Goals**

- Knowledge of the basic content of the Old and New Testaments
- Knowledge of the literature of the Old and New Testaments, their composition and contexts
- Knowledge of history of Israel and ancient Near Eastern context
- Knowledge of the theologies and theological themes of both Old Testament and New Testament literature
- Knowledge of the history of the early church and its Jewish and Greco-Roman contexts
- Knowledge of Hebrew and Greek sufficient to translate Biblical texts
- Knowledge of various approaches to interpreting Biblical texts
- Ability to exegete the OT and NT taking account of their ancient contexts and using the original language texts
- Ability to use the results of your interpretation of Biblical texts to interpret contemporary reality

### **Theology Learning Goals**

- Ability to locate your personal theology within a spectrum of Christology and other theological models
- Awareness of the contextual character of theological reflection
- Some awareness of the interaction of religion and theology with the natural sciences, the social sciences, and contemporary culture in general
- Knowledge of what it means to think theologically
- Knowledge of classical formulation(s) of theology, anthropology, ecclesiology, eschatology and revelation
- Knowledge of the development of Reformed theological thought on each major doctrine
- Knowledge of a major theological doctrine from a global perspective
- Knowledge of contemporary movements in theological development and methodology.

- Ability to use the distinctive resources of the Reformed theological tradition, including the *Book of Confessions*, in your own theological reasoning

### **Ethics Learning Goals**

- Knowledge of historic and contemporary Reformed moral traditions and their methods
- Skill in ethical reflection and moral reasoning, including aptitude in the complexities and ambiguities involved in moral reasoning and decision-making
- Ability to develop and articulate your own methods of moral reasoning
- Ability to apply Scripture and ethical reflection responsibly to moral decision-making
- Ability to engage in ethical discernment within organizations

### **History Learning Goals**

- Understanding of historical method as applied to religion and theology, with attention to interpretive issues
- Familiarity with the development of Christian thought and of the Church as an institution in global contexts from its beginnings to the present day
- Awareness of how historical knowledge illuminates the contemporary situation in theology and ministry
- Knowledge of Presbyterian history, especially as it unfolds in the historical context of the United States

### **Worship Learning Goals**

- Basic knowledge of the history, theology, forms, and practice of Christian worship including administration of the sacraments and baptism.
- Familiarity with the worship forms and texts of the Reformed tradition
- Ability to articulate a theology of worship consonant with the Reformed tradition
- Ability to prepare and lead worship services grounded in the Reformed tradition that are appropriate to the various circumstances and contexts of a congregation, including use of music, arts, movement, word, drama

### **Preaching Learning Goals**

- An understanding of the nature and role of preaching within Reformed Christian worship

- Development of skills including: integration of Biblical interpretation in homiletical work; interpretation of the congregation and its context; and ability to connect the Biblical witness to contemporary need Ability to reflect on and analyze one's own sermons as well as those of others Development of effective sermon composition and delivery skills
- Familiarity with the lectionary and its rationale, and ability to use it appropriately in one's practice of preaching

### **Christian Education Learning Goals**

- Ability to articulate the role and task of education in church life within the Reformed tradition
- Ability to articulate a theology and theory of education and to develop educational practices consistent with them
- Ability to plan, teach, and evaluate one's own teaching
- Basic ability to evaluate curricular resources for all ages, consistent with the Reformed tradition
- Knowledge and experience of various spiritual disciplines and how they may be used within a congregation

### **Pastoral Care Learning Goals**

- Ability to understand and use appropriate methods of pastoral theology
- Ability to understand the settings for pastoral care and the knowledge and skills called for by each, such as the following:
  - Bereavement and grief
  - Premarital preparation
  - Suicide threats
  - Domestic violence (including child and elder neglect and abuse)
  - Aging
  - Alcohol (and other) addictions
  - Hospitalization and illness
  - Family needs and dynamics
  - Knowledge of short-term pastoral counseling approaches and skills
  - Ability to understand and maintain a clear set of professional ethics and appropriate boundaries of pastoral care and counseling
  - Skills in reflective listening and pastoral presence
  - Skills in the use of theology and religious resources in pastoral care
  - Skills in conflict management
  - An understanding of the limitations of pastoral care and counseling
  - Skills in assessing referral needs, developing referral procedures, and assessing and selecting good referral resources
  - Self-awareness and self care, including selection of spiritual disciplines for oneself, observance of Sabbath rest and renewal, regular recreation and exercise, and appropriate boundary-setting for self and family

## **Leadership and Administration Learning Goals**

- Basic understanding of ecclesiology in the Reformed tradition
- Understanding of PCUSA polity as an implementation of a Reformed ecclesiology
- Basic skills in administration, including budgeting, personnel management, and conflict management
- Understanding of the complexity and challenges of working in churches of various sizes
- Ability to understand the life of a congregation and its leadership needs by drawing upon appropriate theological, sociological, and other sources
- Ability to provide leadership in the development of institutional forms that effectively implement and promote congregational mission
- Knowledge of the theologies and practices of stewardship and the PC(USA) resources available
- Knowledge of and commitment to the mission of the PC(USA)
- Knowledge of elementary theory and practices of conflict management that empower the congregation, and ability to apply them in a particular setting
- Knowledge of small group theory and its application within congregations
- Ability to provide leadership in congregational planning for evangelism, including the use of various approaches and PC(USA) resources
- Ability to empower lay leadership in the ministry of the church, including worship planning, liturgy, worship leadership, education, social justice, and caring ministries
- Ability to guide a congregation in reflecting on social justice issues such as race, class, and gender, and in discerning its appropriate corporate response
- Ability to lead and participate, as appropriate, in ecumenical and interfaith relationships

## **Scholarship Guidelines**

The CPM in awarding scholarships will prioritize the giving of awards to candidates under care of this Presbytery first, then inquirers under care of this Presbytery.

**NO SCHOLARSHIP AWARD WILL BE GIVEN TO ANY PERSON WHO IS NOT UNDER CARE OF THIS PRESBYTERY AS A CANDIDATE OR ENROLLED AS AN INQUIRER OF THIS PRESBYTERY.**

- Students must submit a full application to the CPM that includes a financial statement for the academic year in which funds are requested at least three months prior to beginning studies.
- Students must demonstrate financial need by disclosing the total amount of income he/she will be receiving from scholarships, loans, grants, personal earnings, spouse's income, other assets, or financial assistance from church or family. Students need to explain an effort he/she has made to explore other sources of income such as meeting with financial aid personnel of the Seminary he/she will be attending.
- Scholarships will be awarded on the basis of available funds, and will not exceed One Thousand Dollars (\$1000) per year per applicant. Students must reapply each year to demonstrate their eligibility for a scholarship. Scholarships will be available to Candidates in their third and final year or pro-rated if they are part-time students. Scholarships will be available to Inquirers for a maximum of two years or pro-rated if they are part-time students.
- Scholarship money awarded to students will be sent directly to the Seminary where the student is matriculated in the M.Div. Program.
- The CPM may provide funds, if available, to eligible students for clinical pastoral education. These funds will be over and above any scholarship money which may have been awarded.
- The CPM will review requests and award scholarships on a yearly basis or more often if needed, if the student's financial situation changes, based upon available funds.
- 1/3 of expenses for vocational assessment will be provided for the Inquirer/Candidate.
- The CPM will inform students that scholarships are not intended to meet all financial needs of the applicant's seminary education, but to assist in meeting some of the expenses as a part of the Committee's caring nature with the Candidate or Inquirer.

## **Candidate Indebtedness Policy**

### **When the Presbytery of Geneva is the Presbytery of Care:**

- In order to assess net worth, and to make a plan for financing the cost of seminary, inquirers are required to:
  - attend a Board of Pensions "Fiscal Fitness" workshop held annually at each of the eleven Presbyterian seminaries during inquiry, or

- meet with the Board of Pensions regional representative or the Presbyterian Foundation representative during inquiry
- The Presbytery of Geneva will share the cost, with the congregation of which the candidate is a member, and the candidate, of attending a Career and Counseling Center for career guidance in pursuit of ordination in the Presbyterian Church (USA).
- A designee of the Presbytery's CPM will make available annually the median income for the denomination reported by the Board of Pensions, and the minimum effective salary established by the Presbytery of Geneva.
- The CPM will be an advocate with the congregation of which the inquirer or candidate is a member, and with other congregations of the Presbytery as appropriate, in order to generate financial support for the inquirer or candidate in the form of grants.
- The CPM will make available upon request a list of options for pursuing grants and interest free loans and other funding that may be available through the Financial Aid for Studies Office of the Presbyterian Church (USA) and PC(USA) seminaries.
- The CPM may suggest that Inquirers and Candidates work with a financial advisor on their own to evaluate or anticipate indebtedness and assets.

**When the Presbytery of Geneva is the Presbytery of Call:**

- When a minister serving a first call following graduation from seminary comes with educational indebtedness and wishes to access assistance from the Board of Pensions, he/she shall be asked if they have attended a financial planning workshop such as a Fiscal Fitness workshop sponsored by the Board of Pensions, or other financial planning workshop. If the minister has not attended such a workshop, he/she shall be required to do so within twelve months of start-up, the cost of registration fee, accommodation and travel for such a workshop to be considered legitimate reimbursable expense from study leave allowance.
- The Committee on Ministry shall encourage calling congregations to utilize further educational debt reduction as a point in negotiating salary with a prospective pastor who is a recent seminary graduate.
- Processing of applications to the Seminary Debt Assistance Program shall be the responsibility of Presbytery's Board of Pensions liaison, through the Clergy Care and Development Committee. Ministers interested in applying to the Board of Pension's Seminary Debt Assistance Program should be referred to the liaison.

- The Committee on Ministry shall advise ministers being called to churches in the Presbytery of Geneva of the availability of this program. Those who meet the qualifications to apply for the Board of Pension's Seminary Debt Assistance Program will be referred to the Presbytery's Board of Pensions liaison.

## **Requirements for Inquirers/Candidates in Field Education**

### **General Principles**

Relevant passages from the Book of Order and the PC(USA) Preparation for Ministry Manual:

- It shall be the duty of presbytery . . . to give guidance in regard to . . . practical training and field education (G-14.0306).
- The inquirer or candidate shall be encouraged to engage in some form of service to the church with the approval and under the guidance of the committee on preparation for ministry (G- 14.0307).
- Field education assignments that are under the supervision of a theological institution do not require Presbytery approval (G-14.0307).
- Other assignments which are not part of a student's required field education program may be required by the CPM as the individuals' needs are identified during the evaluation process (see *PFM Manual*, p.26 sec.2, para.3).

### **Purpose**

The primary purpose of field education and other forms of service to the church is the inquirer/candidate's preparation for future ministry in the church and church-related ministries. Other purposes, including those of performing a present-day ministry and earning a stipend, are subordinate to, but not necessarily in conflict with, the purpose identified above.

### **Responsibility and Discretion**

It is the CPM's responsibility to provide oversight and guidance for the quality of an inquirer's or candidate's preparation for ministry which includes encouraging the inquirer or candidate to engage in some form of service to the church. The forms of service which the CPM requires are

- field education supervised by a theological institution and

- one unit of Clinical Pastoral Education. (NOTE: requirements concerning CPE are not addressed in this policy.)

In cases of other forms of service to the church during inquiry and candidacy, which are not part of a student's required experience but which are undertaken for the sake of additional experience and/or income, the CPM shall provide guidance and may recommend types of services that would be of benefit for preparation for ministry.

It is normally the case that inquirers and candidates will be given discretion, subject to the principles of this statement of policy, in selecting places of further service beyond their mandatory requirements. In exceptional cases, and for reasons that shall be recorded in the CPM's minutes, an inquirer/candidate may be either required or denied permission to undertake a proposed service. Clearly-defined boundaries are expected in any agreement between an inquirer/candidate and the church in which he or she may serve.

In the case of supervised field education under the direction of a theological institution, that institution's field work department has the primary responsibility of arranging and monitoring agreements. In cases where a student who has fulfilled his or her field work responsibility seeks a place of service for the purpose of gaining additional experience and/or income, the inquirer/candidate has primary responsibility for arranging and monitoring such agreements and the CPM shall provide guidance and may make recommendations as the individual's needs are identified. All field work and other forms of service to the church shall conform to G-14.0307.

### **Clarity and Communication**

The CPM shall exercise care in determining whether its counsel to a student is advisory or mandatory. When, however, a decision has been made by the CPM and it has been communicated to the inquirer/candidate, it will not be made more restrictive later except under extraordinary circumstances which shall be recorded in the minutes of the Committee. Similarly, principles of fairness require that situations of students in similar circumstances be dealt with in approximately the same ways, even though these decisions may have been made by the CPM on different occasions.

All communications to inquirers/candidates shall clearly indicate whether a particular expression of counsel is mandatory for the student, who in that case must conform to it; or whether it is advice which, having given it due consideration, the student may follow or not follow according to his or her own discretion. In order to avoid miscommunication, the precision modeled in the Preface to the *Book of Order* is to be sought even when different language is used: *In this Book of Order (1) "Shall" and "is to be/are to be" signify practice that is mandated, (2) "Should" signifies practice that is strongly recommended, (3) "Is appropriate" signifies practice that is commended as suitable, (4) "May" signifies practice that is permissible but not required.*

### **Values for Consideration in Selecting Places of Service:**

Criteria to be employed in an inquirer or candidate's selection of a place for field education or other service to the church and the CPM's offering counsel to one making such a selection shall include

- the diversity of the experience, in accordance with the principles set below;
- an opportunity for the inquirer/candidate's growth in faith and in the skills of ministry;
- an opportunity for the students to earn a stipend to assist with the expenses of education and living. It is understood that, in a given case, not all of these values will be equally attainable. Inquirers/ candidates, and the CPM in its offering of counsel, shall seek to obtain the best possible balance of these criteria.

### **Diversity:**

The Presbytery of Geneva values diversity among the concerns which should guide the selection of a setting for field education or other service to the church. *The church in its witness to the uniqueness of the Christian faith is called to mission and must be responsive to diversity in both the church and the world. Thus the fellowship of Christians as it gathers for worship and orders its corporate life will display a rich variety of form, practice, language, program, nurture, and service to suit culture and need.* (G-4.0401). The inclusiveness toward which the church strives is characterized by the inclusion and representation of *persons of all racial ethnic groups, different ages, both sexes, various disabilities, diverse geographical areas, different theological positions consistent with the Reformed tradition, as well as different marital conditions* (G.4.0403). We seek to have students discover new settings of diversity beyond those which they may have experienced previously.

## **Additional Experiential Recommendations**

Either inside or outside of the Field Education or CPE experience, it is recommended that the candidate experience the following practical items:

### **Pastoral Care**

- Watch PBS Frontline The Undertaking
  - <http://www.pbs.org/wgbh/pages/frontline/undertaking/>
- Attend 1 funeral/ plan 1 funeral service/meet w/ funeral director
- Do 3-4 visits in hospitals/nursing homes

- Talk with hospital/assisted living/hospice chaplain

### **Christian Education / Spiritual Formation**

- Talk with 3 different churches (differing in size, setting etc.). Find out what they are doing for Christian Education for adults and children: schedules, curricula, “child safe” policies, timing, special activities, etc.
- Research/participate in activities/classes for people with learning/developmental disabilities
- Develop a year-long schedule for both adult and children’s learning and faith development activities
- Write lesson plans for a 5-week adult course, a 1-month children’s series, and a 1-day multi-generational learning event
- Give proposed outcomes, resources needed, costs, time frames, etc.
- Participate in at least one VBS, from planning to execution to final evaluation

### **Worship**

- Review Book of Order on worship
- Work with pastor to design worship service- List all resources used
- Meet with musician to discuss music in worship
- Go to worship service not similar to your own style
- Write an order for worship that is not a Sunday morning worship

### **Presbytery / Polity**

- Attend Presbytery meetings starting now.
- Find a Presbytery meeting in another Presbytery and attend it. If there is a Synod meeting during your training period attend it.
- Ask the Presbytery Leader for the names of two or three pastors who are great contributors; interview them and find out what they like and don’t like.
- Study a recent overture to the General Assembly, what was it; what happened to it. What if it had been your faithful idea would you do differently? Present your plan to your mentor.
- With your mentor help identify one area of Presbytery that you think needs strengthening. Contact the Nominating Committee and let them know of your willingness to serve on a committee, if you do not do so already.

- Attend Session meetings in 3 different churches-
- Highly recommend attending a Presbyterian Women's event (local, Presbytery, Synod, or churchwide).
- Read Paul Hooker's Faith, Hope, Love and Witness

### **Finance, Administration, and Stewardship**

- Talk with your church's financial secretary/treasurer/elder. Review how budget is determined, what fundraisers (if any) are done, what policies are in place for endowments/benevolence giving
- If possible, look at other church's budget/spread sheet/mission giving-remembering appropriate boundaries and discretion
- Look at per capita giving and mission giving- review & discuss
- Read one book/article/resource on stewardship-write about pros and cons of this proposed method of stewardship

### **Music (highly recommended)**

- Develop one of your own musical talents. Can you lead the congregation in the doxology, or at least get it started? Can you help the congregation keep time? Can you play "Happy Birthday" on the piano? Do one of these things at your mentor's church.
- Visit three churches with excellent music programs for Sunday. They don't have to be Presbyterian. Check their sound systems. Find the owner's manual for the system online.
- Visit a "mega church" with large screens and sound systems – look at their worship music, watch the interactions. Plan to speak to the sound engineer after the service.
- Get to know what's out there. Go to at least three Christian music concerts.
- It is summer, your church doesn't have a choir, and your organist/piano player just got sick on the way to church – you are the music today. What are you going to do? Provide all of the music for the service.

### **Church Repair / Maintenance (highly recommended)**

- With your mentor's help select three churches - preferably one of them will need lots of repairs.
- Visit each church and identify their heating and cooling systems, water, their roofing material, their sound systems, their handicap accessibility, the fire alarm system, emergency exits, the carpeting how old each of these items is. Check the outside gutters, lawn care and parking lot.

- Find online the operating manuals for a heating system, a fire alarm system and a stove (even if the church already has them).
- Talk with your own churches building & grounds committee/sexton, etc. Shadow them/attend Building & Grounds committee meeting. Look at annual budget and any reserve accounts earmarked for building/capital expenses
- Have your mentor create an emergency scenario of something that just broke at your church.
- Learn about large scale heating systems and thermostats. Even small churches have large heating systems.
- Create either
  - a plan for complete building maintenance for a small rural church. Call plumbers, electricians, insurance brokers as needed to get the information you need, or
  - a building maintenance and improvement plan that will lower your present church's insurance costs.

## **Preparation for Ministry Process Forms**

### **Application Forms**

There are four forms to the application for enrollment as an inquirer:

#### **❖ Form 1A: Application to be enrolled by Presbytery as an Inquirer**

To be completed initially by the applicant seeking to be enrolled. Both the committee/commission overseeing preparation for ministry and the presbytery's actions regarding the application are recorded on this form. It provides basic information regarding the applicant's background, identity, and interests. This form includes a list of personal references.

- Filled out by applicant and given to Session.
- Signed by applicant.

#### **❖ Form 1B: Questions for Reflection**

These questions are to be completed by the applicant as a basis for direct discussion first with the session of the applicant's home church and later with the Presbytery's CPM.

- Filled out by applicant and given to Session.
- Signed by applicant.

#### **❖ Form 1C: Financial Planning for Theological Education**

Using basic information provided by the applicant, this spreadsheet automatically generates a projection of the applicant's financial resources and needs relative to the required seminary training.

- Filled out by applicant and given to Session.
- Signed by applicant.

❖ **Form 1D: Session Evaluation and Recommendations**

This form is completed by the applicant's session and forwarded along with the other application forms to the CPM. The form includes questions that may guide the Session's discussion with the applicant and provide support for its recommendation to the CPM.

- Filled out by Session and given to the CPM, along with Forms 1A, 1B and 1C, before applicant meets with the Committee.

**Forms for Enrolling as an Inquirer:**

These forms are used by applicants and their committee/commission overseeing preparation for ministry when a decision has been made to recommend the applicant be enrolled by the Presbytery as an inquirer.

❖ **Form 2A: Report of Consultation regarding application**

In addition to formulating its recommendation to the presbytery to enroll the applicant as an inquirer, the CPM should also establish goals for the first year the new inquirer will be under care. This form records the growth objectives agreed to by the new Inquirer and the CPM. The completed report is sent to the enrollee, the theological institution, and the sponsoring Session.

- Filled out after CPM action to enrolling applicant as an inquirer.
- If enrolled, signed by inquirer, CPM liaison and CPM chair.
- Distributed to CPM members, inquirer, theological seminary, and Session.

❖ **Form 2B: Covenant Agreement and Inquirer Release**

A signed acknowledgement of the new covenant relationship entered into by the inquirer, the Session and the CPM. The inquirer release sets in motion an understanding that permits the CPM to secure information necessary to make responsible decisions and recommendations.

- Filled out after Form 2A is completed.
- Signed by inquirer, Session moderator, and CPM chair.

- Distributed to CPM members, inquirer, Session moderator, and Stated Clerk.
- Enrollment is reported to Presbytery.
- Form 7A is filled out.

### **Forms for Annual Consultations**

These are used to prepare for and report the outcome of a consultation. The same forms are used in the inquiry and candidacy phases as well as for consultations once a candidate has been “certified ready to be examined for ordination, pending a call.”

#### **❖ Form 3: Pre-consultation report on development areas**

This report, completed by the inquirer/candidate before each consultation, evaluates progress in accomplishing previously agreed-upon goals and objectives. The form requests a listing of completed courses, and includes specific questions to be addressed in each of the five growth areas.

- First section filled out by CPM chair; balance filled out by inquirer or candidate.
- Sent to CPM before consultation.

#### **❖ Form 4: Report on Consultation**

A summary report of the consultation, completed by the CPM and the inquirer/candidate that indicates developmental progress in the five key areas along with growth objectives agreed to for the next year. The completed report is sent to the inquirer/candidate, theological institution, and sponsoring Session.

- Filled out after consultation with CPM.
- Signed by inquirer or candidate, CPM liaison and CPM chair.
- Distributed to CPM members, inquirer or candidate, theological institution, and Session.

### **Forms for Advancing to Candidacy**

These forms are used by inquirers and the CPM when a decision has been made to recommend the inquirer be advanced by the presbytery to candidate status.

#### **❖ Form 5A: Application to be enrolled by Presbytery as a Candidate**

To be completed initially by the Inquirer seeking to be advanced to candidacy. The recommendations of the session and the CPM along with the action taken by the presbytery are recorded on this form.

- Filled out by inquirer and given to Session.

❖ **Form 5B: Session evaluation and recommendation for Candidate**

This form is completed by the inquirer's session and forwarded to the CPM. The form includes questions that may guide the session's discussion with the inquirer and provide support for its recommendation to the CPM. Attach a letter explaining rationale for the session's action in light of inquirer's suitability.

- Filled out by Session and forwarded to CPM along with Form 5A.
- If approved, applicant submits Statement of Motivation for Seeking the Ministry and is examined by Presbytery.
- ❖ Form 7A is filled out.

❖ **Form 5C: Report of Consultation Regarding Application to become a Candidate**

A signed acknowledgement of the new covenant relationship entered into by the candidate and the CPM. This form also establishes growth areas for candidate. The completed report is sent to the inquirer/candidate, theological institution, and sponsoring session.

- Filled out after consultation with inquirer.
- Signed by inquirer, CPM liaison and COM chair.
- Distributed to CPM members, inquirer, theological institution, and Session.

❖ **Form 5D: Covenant Agreement and Candidate Release**

A signed acknowledgement of the new covenant relationship entered into by the candidate, the session and the CPM. The candidate release sets in motion an understanding that permits the CPM to secure information necessary to make responsible decisions and recommendations.

- Filled out after ❖ Form 5C is completed.
- Signed by candidate, Session moderator, and CPM chair.
- Distributed to CPM members, candidate, Session moderator, and Stated Clerk.

**Forms that Complete Work with the CPM:**

These forms "complete" in different ways the work between a particular CPM and an inquirer/candidate in the process of preparation for the role of teaching elder. They cover transfer of care to another presbytery's committee/commission overseeing preparation for ministry, withdrawal/removal from the process, certification of readiness to receive a call, and ordination to the role of teaching elder.

❖ **Form 6: Summary Report of Final Assessment**

This form, completed by the CPM, acknowledges that a final assessment of the candidate's preparation and readiness to begin ministry has been conducted. It certifies that she/he has successfully completed all of the denominational and CPM requirements and so is ready to be examined for ordination. (Since this report may need to be shared with another calling presbytery, this form should be used by all presbyteries.)

- Filled out by CPM chair.
- Signed by CPM chair.
- Distributed to CPM members and shared with a calling presbytery.
- ❖ Form 7A is filled out.

❖ **Form 7A: Changing the Relationship of Care with the Presbytery**

This form is used when anything changes within the process. Such as enrolling as an inquirer, advancing to candidacy, transferring covenant relationship, or being certified ready to receive call. It is completed and signed by the stated clerk who sends the form to the Office of the General Assembly at the address indicated. (This form should be used by all presbyteries.)

- Filled out by CPM chair.
- Signed by Stated Clerk.
- Distributed to CPM members, Stated Clerk and OGA.

❖ **Form 7B: Report of Conclusion of Work with this Presbytery**

This form is used to report the ending of the preparation for ministry process (through transfer, withdrawal, removal or ordination) to the Office of the General Assembly. (This form should be used by all presbyteries.)

- Filled out by CPM chair.
- Signed by Stated Clerk.
- Distributed to CPM members, Stated Clerk and OGA.

*Forms are available at <http://www.pcusa.org/resource/list/forms/>*

## **Policy on Maintaining Files of Inquirers/Candidates**

The CPM Chairperson is responsible for inquirer/candidate files. The Chairperson may, in writing, delegate responsibility for file maintenance to a records clerk. Such files are to be treated as confidential information by the CPM. Documents to be kept in such files include: official forms, academic transcripts, correspondence, reports from psychologists or counseling services, field work evaluations, ordination examinations, results of annual consultations, or other items deemed necessary by CPM or the Presbytery Leader as relating directly to the investigation, evaluation or performance of the inquirer or candidate. The

contents of the files are the property of the CPM and exist for the sole purpose of evaluating the suitability, preparation and readiness of a person for ministry in the Presbyterian Church (USA). The following policies and practices shall govern the files of all inquirer/candidate in the Presbytery of Geneva.

### **Disclosure**

Each person enrolled as an inquirer shall receive a copy of this policy and shall sign for receipt of the policy.

### **Access to Files**

Access to files shall be restricted to the Chairperson(s) of the CPM, the Presbytery Administrative Assistant, and the Presbytery Leader. In addition, each committee liaison may have access to his/her inquirer's or candidate's file. Inquirers and candidates may review the contents of their files when they request permission to do so from their CPM liaison and in the presence of their liaison or any one of the persons named above.

### **Control of Files**

Control of files shall be restricted to the Administrative Assistant of Presbytery and to the Presbytery Leader.

### **Location of Files**

Confidential files are held in a locked file cabinet in the office of the Administrative Assistant of Presbytery.

### **Keys to Files**

Keyed access to the files is kept solely by the Presbytery Administrative Assistant and Chair(s) of CPM.

### **Contents of Files**

Each file shall include a progress report with information recorded as it is added to the file. This progress report will serve as a checklist for the entire file. All referenced documents will be included in the file. Sessions will be informed that any additional information they supply to the committee, such as letters of comment, will be shared with the inquirer/candidate and placed in the file along with any additional information the inquirer/candidate supplies.

### **Backup Files**

No formal backup files exist. However, each committee liaison maintains a personal file of relevant (but not complete) material. In addition, each inquirer/candidate is encouraged to keep a duplicate copy of all materials placed in his/her official file.

## **Transfer of Files**

When an inquirer or candidate is transferred to another presbytery, his/her file shall be forwarded to the CPM of that presbytery. Files are to be sent by certified mail or by a delivery service that tracks its deliveries (such as United Parcel Service). A copy of this policy shall be sent with the file to the receiving presbytery.

## **Files of Persons Completing or Withdrawing from the Process**

File materials of persons completing the process and becoming ordained shall be kept as follows:

- Copies of such materials shall be kept by the Presbytery in sealed files to be opened only by Presbytery Leader or CPM chairperson and shall include the ordained person's progress report completely filled in with copies of:
  - (a) Final Evaluation
  - (b) Field Work Evaluation
  - (c) CPE Final Report from institution
  - (d) Reports of any required therapy
- All original materials shall be returned to the person ordained by hand delivery with receipt or by mailing them Certified, Receipt Requested, except those materials the CPM votes to hold for a specific length of time.

File materials of persons withdrawing from the process shall be kept for five years with a removal date for shredding clearly marked on the front of the file.

## **Members Leaving CPM**

When a member leaves the Committee the tote box containing all materials on inquirers/candidates shall be returned to the Presbytery of Geneva Office. Such members shall verify to the chair of CPM that all electronic data has been removed from their computer files and hard drive.