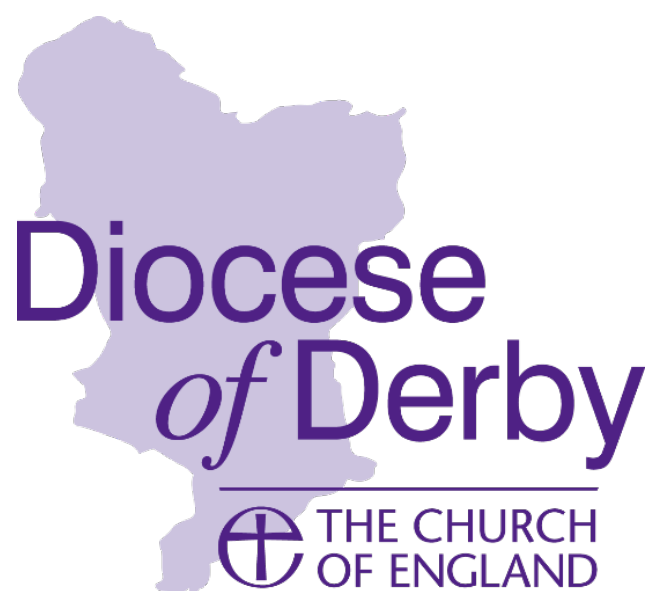


PORTFOLIO & ASSESSMENT GUIDEBOOK



Diocese of Derby 2023

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WELCOME & INTRODUCTION

Welcome! Hopefully, this guidebook should answer all your questions about portfolios, reports and the assessment side of your curacy. Consider:

‘The best learning happens when you’re doing’ *Sorry, but that’s just wrong!*

The best learning happens when you reflect on what you do so you can do it better next time.

Of course, much of your curacy will be about this iterative process of doing – reflecting and doing again. The creation and presentation of a portfolio is a creative (*and hopefully enjoyable process*). It journals your curacy ministry as you collect evidence of how sufficiently you inhabit the seven formational qualities for ministry – or the fifteen pioneer principles if you are officially an Ordained Pioneer Minister. You will probably be familiar with these from IME1. They were also the qualities you were selected against at BAP. As well as providing vital evidence of how well you inhabit the qualities, your portfolio gives you a tool to celebrate the work God has given you to do and a place of encouragement as you see your ministry flourish and grow. Perhaps most vitally, it drives you towards a practice of constant reflection which will be an important foundation stone in your emerging public ministry.

The danger of any role is that you get ‘stuck in the rut’ of doing the same things over and over again. This must not happen in your curacy – the portfolio is one way of ensuring you gain all the necessary experiences to be a competent well-rounded minister.

For those being ordained Deacon 2023:

Welcome to your curacy in the Diocese of Derby!

We are pleased to have you with us and to journey with you through these first formative years of your ordained ministry. I know everything in this booklet will feel like a lot of information and that it will be hard to process. Please don’t worry or let yourself be overwhelmed. It will be explained in detail – and know we are here to support you – please feel free to ask questions if anything is unclear!

For those who were ordained Deacon 2022 or earlier:

The new qualities will not apply to you. If there are any questions or concerns, be sure to go to the handbook for the year you were ordained. We will follow those criteria and processes. We continue to:

1. Provide you with more external evidence (while not making a lot of extra work for you)
2. To continue to clearly align all the evidence gathering with the national qualities
3. To provide a more robust assessment (and remove any unconscious bias) with multiple assessors for your portfolio

TRAINING INCUMBENTS' PORTFOLIO TOP 10

How to encourage your curate to be ready for assessment:

1. The best way to do a portfolio is little and often
2. Help them to reflect, think why and explore it
3. Notice if they've clearly stated which of the qualities (imagine you are an assessor seeing it cold)
4. Encourage them to use the language of the qualities
5. They can join similar outcomes together but see 3 and 4 above!
6. Don't let them go back and rewrite early pieces of work (show growth, not a finished product)
7. Encourage them to be economical and not to fill it up needlessly
8. Do ask often how they are getting on and if they have enough time for study
9. Don't feel the portfolio is your responsibility – it's not, it's theirs
10. Help them to remember the portfolio is evidence of the curacy

INITIAL MINISTERIAL EDUCATION PHASE 2

Initial Ministerial Education (IME) is the term used to cover the whole of the training period for a minister. IME Phase 1 refers to training prior to ordination. IME Phase 2 covers the period after ordination (the period covered by curacy).

The Ordained Ministries Development Officer is responsible for arranging a course of training beyond that obtained in the parish. **IME events are to be regarded as compulsory for curates, and they should take priority in a Curate's diary over parish duties and holiday.**

A Pattern for IME Phase 2

IME Phase 2 offers a pattern that is a blended learning style together with specific training events especially tailored to particular types of ministries.

Core Programme

A core programme is offered to all curates. **Attendance is expected at all sessions.** Unless there is an illness or emergency, attendance is necessary to successfully complete the attendance qualities. Bespoke arrangements will be made with SSM and MSE curates who are doing their curacy part-time and unable to attend due to other commitments; please contact the Ordained Ministries Development Officer in good time to make alternative arrangements should this be the case. At the end of each session participants will be invited to complete a session review / feedback form.

On-line Courses

In addition to online safeguarding courses that you are required to complete, there will be a few short online courses (between 30 minutes to 2 hours) that will need to be completed by curates each year. ALL curates who have not yet been signed off will complete the following short online courses next year:

- Unconscious Bias
- Equality & Diversity
- Mental Health Awareness

Supervision with Curate & TI

Supervision is a very particular discipline within a curacy. It is vitally important and forms the key place where the Curate and Training Incumbent reflect together on the curate's ministry. Supervision is not an optional extra – it should form the core of a curacy.

Supervision is different to a staff meeting. It is a conscious and formal setting aside of time to support the curate's learning. Staff meeting issues, such as scheduling events or matters that involve other people, should be kept out of Supervision.

Pastoral Support Groups

All curates participate in bi-monthly Pastoral Support Groups throughout their curacy (starting in January of the deacon year).

Based on research, the value of Pastoral Support Groups are:

- Shared understanding and experience – ‘other people who know what it’s like’
- Sharing common problems
- Relieving loneliness and isolation of ministry
- Valuing the perspective / experience of others
- A safe place to express / vent feelings / anger and not having to protect anyone
- Putting things in perspective – alleviating feelings of stress and guilt – ‘it’s not just me’
- Continuity – the ongoing nature of the groups similar to a Home Group or Cell Group
- Trying things out when not sure
- Humour – a way of ‘letting off steam’ and relieving tension¹

This practice accomplishes a number of goals. It is intended to ensure a safer practice of ministry for the sake of those ministered amongst and to support the well-being of the ministers themselves. It is also expected to have a formative dimension through a balanced approach to supervision (devised by Inskipp and Proctor) that attends to:

1. **The normative:** ensuring shared theological reflection on the practices and vocation of ministry within the horizon of God’s mission and within the Church of England’s code of conduct; and the shared identification of risks to self and others and the identification of steps to ameliorate those risks.
2. **The formative:** offering support for lifelong learning, formation, and development in ministry through shared reflection.
3. **The restorative:** ensuring that the vocation and work of the minister is shared, valued, and nurtured and that health and wellbeing issues for ministers are addressed.

In addition, it is the hope that supervision would eventually have a wide range of impacts in the life of the curate (and the wider Church), including:

1. Reduced symptoms of isolation and stress amongst its ordained ministers (such as sickness and vulnerability) through a realistic and regular structure of collegiality and accountability in which ministers are regularly sharing the detail of their practice and being listened to
2. A more intentional use of ordained ministers’ time through the opportunity that supervision provides for ministers to think theologically and practically about priorities
3. A more robust handling of risks in church life, including those relating to safeguarding through explicit attention to risk identification and risk management in supervision

¹ Based on research completed by Barrett (2010) in Salisbury and Bristol Reflective Practice Groups. Found in Gubi et al, ‘Reflective Practice Groups for Clergy’ (2020)

4. More safety for everyone in church life through heightened awareness in supervision of boundaries, expected conduct, role clarity and the use of power
5. More safety for everyone in church life through the opportunity in supervision to explore the unconscious factors that sometimes undermine best intentions
6. Better communication as those in oversight become more aware, through supervising others, of the challenges being faced on the ground
7. Less anxiety in the face of change as ministers share responsibility for risks, priorities, and hard decisions with any of their supervisors (in the broad sense)
8. Clearer lines of accountability in which the responsibilities and roles of ministers in oversight are better understood and are routinely operated in practice.

The use of Pastoral Support Groups has been the norm in a number of professions for decades, including Spiritual Directors, Doctors, Teachers, Counsellors, and Social Workers.²

Curate Residential Conferences

Twice a year, all those in the first three years of IME Phase 2 go away for a residential weekend conference. This is an important part of the IME programme and should be regarded as a compulsory part of the curate's training. It should take priority over parish duties and holiday. The programme is run over a three-year cycle exploring six themes in total.

Having a weekend away together allows us to engage in a subject with more depth. It is also important for building fellowship and support between curates. During the weekend, time will be spent in year groups for mutual support, prayer, and accountability. This is an important and valuable part of the weekend.

Whilst respecting the breadth of the Church of England, there will be times at a Curate Residential Conference when there is a woman presiding at the Eucharist. On these occasions, as with other services during the weekend, all curates are expected to attend the service. There is, of course, no compulsion to receive the Eucharist.

On return from Curate Residential Conference, curates should not engage in parish duties on the Sunday evening. Training Incumbents are asked to respect the fact that curates will have been working hard at the training event from Friday night until Sunday afternoon.

Priests (Year 4 and beyond)

The fourth and subsequent years of curacy are normally free from compulsory IME events. If fourth year curates wish to attend any of the IME events advertised, they would be welcomed but should contact the Ordained Ministries Development Officer.

² Material adapted from Jane Leach's article for the Methodist Church: 'Responsible Grace – the role of supervision in the renewal of vocation and ministry'

THE LEARNING PLAN

Begun in 2021, this document enables you and your Training Incumbent to keep track of the learning you are doing in your curacy and the evidence you are going to collect to demonstrate it. It should be one of the first things you and your Training Incumbent do together to help you plan the learning needs of your curacy.

At the end of the curacy, it should provide a complete overview of what evidence of learning the portfolio includes and where in the portfolio it can be found.

The learning plan is a table, including the qualities and expectations about occasional offices, which is a working document throughout the curacy. It can be found on the website. Below is an example of Page 1 of the document:

Love for God

	At the end of IME2, the curate...		What is my previous Experience or Expertise?	What Experience or Expertise is needed?	How will this be evidenced or reflected upon?
Christ	Is reliant on God – Father, Son and Holy Spirit - and lives out an infectious, life-transforming faith				
	<u>Examples of evidence might be:</u>				
	1. Shows a vibrant faith that can speak about their own joys and disappointments, experience of change or failure and is able to interpret how grace is at work in their life				
	2. Is growing in Christlike character in daily living for example in love, humility, patience, prayerfulness, and obedience				
	3. Has a well-developed pattern of life based on four foundational texts (Jesus' summary of the law; the Lord's Prayer; the Apostles' creed; the Beatitudes)				
	4. Can describe how their faith is maturing through their curacy				

As the curacy progresses and the learning takes place, evidence and reflections will be generated to show that the qualities are being sufficiently inhabited. These will be collated into a folder or 'Portfolio', along with a series of reports (by Training Incumbent, Self-Evaluation, Lay People, Schools, and Parish Safeguarding Officer). These documents will form the basis for the end of title assessment. **Be sure to keep copies for yourself of all these reports, so they can be included in the portfolio.**

Curates and training incumbents should agree how often they will meet to make decisions about the learning plan. This should be done annually as a minimum, but it may be helpful to do it more frequently, such as every term.

At each learning plan meeting, curates will decide which qualities to work towards over the next few months. They can be accomplished in any order, and it is not envisioned that all the qualities will be planned for at one meeting. You will probably find that the first few qualities seem quite daunting to plan but you will quickly see overlap of the planned actions for the curacy.

The plan will evolve over time and from time-to-time different actions will take place or different evidence will be generated.

Year 2 & Year 3 Individual Formation Plans

Year 2 curates and Year 3 curates will be expected to engage in a more in-depth individually planned formation programme that they propose. At the commencement of Year 2 and Year 3, each curate will submit a short 1-page A4 (there is no template or proforma) written proposal of study / development / formation for the subsequent year to the Ordained Ministries Development Officer, which will be agreed by the Ordained Ministries Development Officer and Training Incumbent. The purpose of this is to allow curates to fill any 'learning gaps' they have identified - but more importantly, to prepare them for self-directed CMD and MDR post-curacy establishing the patterns of self-motivating, self-directed learning borne out of ministerial practice.

The success of this Individual Formation Plans portion of the curacy involves a 'low control (*freedom*), high accountability (*responsibility*)' model of learning.

Those wishing to engage in post-graduate study during their curacy may consider doing so at this point. A conversation with the Ordained Ministries Development Officer and Training Incumbent will be essential before any commitment may be given to an institution for study begins. Those studying towards formal academic qualifications are eligible for their regular CMD Grant plus an Academic CMD Grant of £250 (making a maximum of £500).

SELF-EVALUATION & LAY REPORTS

Self-Evaluation Reports

Each curate will complete an annual Self-Evaluation form (with the exception of the year they submit their portfolio). Please complete in a prayerful manner and submit by the appropriate due date. Proforma to be found on the website.

Preaching & Leading Feedback Forms

Each curate will collect three Preaching Feedback Forms and three Leading Feedback Forms per year. These are to be kept (hopefully, with adjustments made from the feedback) and submitted with the portfolio. Proforma to be found on the website.

Lay Reports

Each curate will ask a Lay Person to write a Lay Person Report each year from their pioneer context / church community / parish. Plan to choose a different person each year (and please try to get different genders / ages / professions / racial diversity). Collect the report from them in a timely fashion in your first, second and third year and save the reports to be included in your portfolio. Note there is a different form for each year. Please do NOT do three reports at once. The goal is to show development over the three years. Proforma to be found on the website.

School Report

Each curate in their Second Year will ask a representative from a school they regularly work with (Head or Assistant Head would be preferred) to write a short report. Collect the report from them in a timely fashion and save the reports to be included in your portfolio. Proforma to be found on the website.

Safeguarding Officer Report

Each curate in their Third Year will ask their Parish Safeguarding Officer to write a short report. Collect the report from them in a timely fashion and save the reports to be included in your portfolio. Proforma to be found on the website.

So... for this coming year, please plan to write / ask people to complete:

If you are Ordained Deacon this year:

- Self-Evaluation Report & Lay Report Year 1
- 3 'Preaching' and 3 'Leading' Feedback Forms

If you are Ordained Priest this year:

- Self-Evaluation Report, Lay Report Year 2 & School Report
- 3 'Preaching' and 3 'Leading' Feedback Forms

If you are Ordained Priest last year NOT Submitting Portfolio this year:

- Self-Evaluation Report, Lay Report Year 3 & Safeguarding Report
- 3 'Preaching' and 3 'Leading' Feedback Forms

If you are Submitting a Portfolio this coming January:

- Lay Report Year 3 & Safeguarding Report
- 3 'Preaching' and 3 'Leading' Feedback Forms

FORMAL ASSESSMENT

National Formation Qualities Framework

The formation qualities are the national church's estimation of what a curacy should include and the characteristics of a priest. Curates need to prove that they sufficiently inhabit the formational qualities and are fit to practise as clergy, whether they are paid to do so or not. The Framework holds them accountable to a minimum standard not only of professional competence but also of personal character and thus is a means of showing how they are fulfilling the ordination vows they made in anticipation of their ordained ministry as a deacon and a priest.

Every curacy remains unique, and it is still recognised that God has called people to specialisms as well as placed particular gifts in each ordained minister. The formation qualities are not therefore a lowest common denominator, but rather a set of principles which need to be interpreted locally.

Formation Qualities

The national formation qualities are essentially The House of Bishops' assessment of what a priest should be, and they are compulsory for all curates.

The contents of those qualities are more stretching for potential incumbents, especially regarding their exercise of oversight. These qualities can be broadly interpreted across all varieties of title posts but sufficiently inhabiting them has to be evidenced so that it is possible for external assessment of what has happened in the title post to take place. The primary reason for having standardised training is the quality of training for ministry with which we honour God's calling in each curate.

The more prosaic side of it is that the assessment forms the legal basis of Bishops' recommendations to each other about a clergy person being 'safe to receive' if you transfer to another diocese and would be a diocese's defence in competency proceedings if a clergy person claimed that their training had not properly prepared them for future ministry.

The Formal Assessment of Curacy takes the following form:

Assessment prior to ordination as priest

The Training Incumbent completes a report on their curate using a standard two-part form. One is formative in nature and the same form will be used every year to show the growth of the curate. The other is a summative report that indicates the Training Incumbent feels the curate is ready to be priested. The Sponsoring Bishop also requests a recommendation from the Ordained Ministries Development Officer at this time. Both these reports recommend to the Sponsoring Bishop that the curate is ready to be priested and will be reviewed in detail prior to ordaining the curate as a priest.

If the reports raise any issues that need further attention, the bishop will meet with the curate (and possibly the Training Incumbent as well). The bishop may also involve the Ordained Ministries Development Officer or others as they see fit.

Assessment at the end of the second year

The Training Incumbent completes their annual formative report to show the continued growth and areas for development. The Ordained Ministries Development Officer will also contact the Curate and Training Incumbent, inviting them to meet. The Meeting has several purposes:

- To check on how things are going generally
- To review progress against the nationally agreed Formation Qualities and fill in any gaps
- To check that a robust plan is in place for completing the curacy
- To begin to identify the Curate's next step in ministry

Following this meeting, a placement (of variable length) may be arranged for the curate by the Ordained Ministries Development Officer.

End of Title Assessment

Curates will enter the Assessment process for the end of curacy either during their third or fourth year of curacy.

- Stipendiary curates will enter the process during the third year of their curacy.
- Deployable non-stipendiary ministers may choose whether to enter the process in the third or fourth year of their curacy.
- This choice should be made based on when they will be best able to demonstrate that they meet the formation qualities.
- Ministers in Secular Employment may find that leaving assessment to the fourth year will allow them more time to complete the curacy whilst simultaneously maintaining a working life.
- The Ordained Ministries Development Officer is happy to offer advice as to the best time for an individual curate to enter the assessment process.

End of Title Assessment involves the following:

- A Portfolio, compiled by the curate.
- A report on the curate from the Training Incumbent, using a standard two-part form. One is the annual formative report to show the continued growth and areas for development that has followed the curate through their curacy. The other is a summative report that indicates the Training Incumbent feels the curate is ready to be recommended to be signed off.
- Reports from Lay People (one per year), Year 2 Schools Representative, and Year 3 Safeguarding Officer, the 3 'Preaching' Feedback Forms from each year and the 3 'Leading' Feedback Forms from each year.
- Meeting with your End of Title Assessor
- A Report from the End of Title Assessor
- A Report on the curate from the Ordained Ministries Development Officer, written after having read the End of Title Assessor's Report, the Portfolio, and Training Incumbent's Report.
- An Interview between the curate and the Sponsoring Bishop.

The timescale for Assessment at the end of curacy looks like this:

- Late Summer/Early Autumn – Meeting with the curate, Training Incumbent and Ordained Ministries Development Officer to look at the portfolio and Learning Plan to determine what gaps need to be addressed before final submission
- Mid-December – Deadline for Lay Report Year 3 and Safeguarding Officer Report
- early January - Deadline for final reports from the Training Incumbent
- 30 January – Submission of curate's Portfolio to their End of Title Assessor
- mid-February – Individual Meeting with End of Title Assessor
- mid-February – End of Title Assessors Moderation Meeting
- 1 March – End of Title Assessors Report submitted to Ordained Ministries Development Officer
- March – Ordained Ministries Development Officer reads the Portfolios and writes Final Report for the Sponsoring Bishop recommending whether to sign off or if more work is required
- April/May/June – The Sponsoring Bishop sees curate to confirm the successful completion of the curacy
- Signed off by May / June

Once a curate has seen the Sponsoring Bishop, they may apply for jobs within the diocese, investigate deployment elsewhere or re-licensing to the parish they serve. No job, redeployment or re-licensing should begin until 3 years have been served from the date of ordination as a Deacon. Curates wishing to apply for posts before the May/June meeting with the Sponsoring Bishop must make an additional appointment with them **prior to submitting an application.**

Interim Report

Should a Training Incumbent leave, or the curacy break down, then the Training Incumbent will normally be asked to complete an Interim Report on the curate. This will form part of the basis for considering the on-going training needs of the curate.

CURACY PORTFOLIOS

The Portfolio is the main means of assessment at the end of curacy. It is also a means of cultivating the habit of reflective practice throughout the rest of your ministry. Remember that the portfolio is a positive exercise. It is to demonstrate what a Curate can do, not to catch them out on what they can't.

A good portfolio will demonstrate all of the Formation Qualities in different ways and with a range of types of evidence. Only enough evidence to demonstrate all the Formation Qualities should be included - and certainly no more than one file in total.

This is a significant piece of work. It allows the Diocese of Derby to say with confidence that a curate has completed their curacy in a manner which is consistent with all other dioceses in the Church of England. Enough time should be allowed to complete the portfolio properly. It is easier to look out for this evidence as the curacy progresses, rather than to try to gather it all at the end. The Ordained Ministries Development Officer is always happy to answer questions or to offer help in relation to Portfolios.

Evidence

It is absolutely vital to say that the learning in a title post happens in the parish or context where the curate is based. The learning does not happen merely on paper. This is not about just ticking boxes! The qualities point to the lived experience of the curacy and the evidence shows that the learning has happened.

The Portfolio needs to provide evidence to demonstrate growth and the achievement of each Learning Outcome / Formation Quality. This is best done by a series of pieces of evidence, each of which may demonstrate more than one Learning Outcome / Formation Quality.

After an event (which could be a service, a pastoral encounter, or a supervision meeting), evidence from the event should be collected in a plastic wallet or folder. Your evidence points to the learning that has happened in the curacy. It seems wise, therefore, to consider evidence which naturally springs from ministry to be brought into the assessment process.

The article can be used as evidence, and if there is any feedback on it, that can become evidence too, by keeping an email response, or writing a brief note recording what someone said to you about it. Evidence could include sermons, meeting minutes, photos, videos, letters, or project work, really anything that demonstrates the qualities you are wishing to sufficiently inhabit and evidence.

But beware! The portfolio is not a scrap book - it is not just a collection of memories. This is a learning portfolio and evidence must be of, or point to, learning... not just what you did or something nice that someone said. As an example of the latter, a card after a funeral that simply thanks you is limited evidence, but one that thanks you for your patience and mentions how the service you took helped the writer to feel peace does offer some feedback on your performance. In other situations, for example after a sermon, it might be appropriate to ask the person speaking to you what it was that they valued in what you said, if they have simply told you they enjoyed the sermon, or given the standard 'nice sermon, vicar' response.

Reflection

a generic term for those intellectual and affective activities in which individuals engage to explore their experiences in order to lead to a new understanding and appreciation.³

In many ways the most important thing your portfolio will demonstrate is your capacity to be a reflective practitioner in mission and ministry. There must be a reflection in your own words on every quality – though the reflections may be grouped together. The wording of the qualities must be clearly referenced in your reflection.

Reflection should include **theological** reflection (about God), **personal** reflection (about you) and **practical** reflection (about the event or context).

Some of the questions below might be used as starters to help you get going if you are stuck on reflection:

- How did it feel?
- How did I learn?
- What is God doing?
- Where is God in this?
- Why did it not go as planned?
- How have I changed?
- What am I ready for?
- Where am I vulnerable?
- What and why would I do differently?

Some of the best and most effective reflections will often be in a creative form – a song, a poem, a painting, embroidery, or photograph. Reflections in these forms will usually need some context placed around them for assessment, but they can be powerful tools to help us to really identify what is going on, and where God is in the whole situation.

³ David Boud, Rosemary Keogh, David Walker (eds) *Reflection: Turning experience into learning* Routledge 1985, p.19.

End of Title Assessors

End of Title Assessors review the evidence provided to them in your portfolio and that is combined with the Ordained Ministries Development Officer's report to form the basis of the recommendation to the Sponsoring Bishop. The assessor will have your portfolio and will have read it in detail. You will then meet with them for an end of title interview. This interview and their report become part of the evidence of your learning. If they felt there were areas where the portfolio missed the qualities, they may ask questions which will help to show the learning you have done.

Although this interview is a serious encounter, like a viva, you will almost certainly find it a rewarding experience as this is your learning in your curacy and you are therefore the expert and will enjoy talking about it. It should also be said that you have the same information that they have – there should be no surprises! Therefore, although it is possible to not complete the end of title assessment satisfactorily, it is unlikely that you would go into that meeting without knowing that your portfolio did not demonstrate all the formation qualities.

From time to time, curates will not have completed the qualities by the end of title assessment or may need to work on one or two after the assessment and be reassessed in those areas before a recommendation to the bishop can be made. This is one reason why the assessment is made while there is still some time left in the curacy, so the qualities to be revisited and a second assessment made.

PORTFOLIO FAQs

How much time should I be spending on my Portfolio?

People have such different ways and rates of working. Some will want to spend half an hour a fortnight keeping track of where they are and then have a blitz of a couple of days to draw it together once a year. Others will thread it into their ministry and supervision so that writing reflective pieces, for example, is an activity of a couple of hours a week and naturally forms a basis for discussion in supervision. If it was taking more than 2 hours a week on average, it would be sensible to talk to the Ordained Ministries Development Officer as you may be doing too much. But a good rule is 'little and often.' **DO NOT LEAVE UNTIL THE LAST MONTH.** THERE IS NO WAY TO SHOW GROWTH IF YOU TRY TO DO THAT.

Why are there reports as well as my own portfolio work?

The reports make your job easier! They ensure the evidence from these people is included in the portfolio and they are cross referenced so that you can see where they contribute to the evidence you are gathering. They also provide external perspectives which allow the assessor to triangulate the evidence.

Can I combine Qualities together?

Yes! It is important to grasp that one piece of ministry might evidence more than one quality. For example, a mission project with a group will almost certainly provide good evidence about your leadership style and how well you can collaborate with others effectively. How you do this is up to you – it's *your* portfolio!

Are all Qualities equal?

Yes, all are equally required. But which ones carry more weight in your case (and stretch you the most) will depend on your calling, your context, and what your previous expertise is. The Learning Plan should help you to identify for yourself where the big areas of emphasis are and which you need to just ensure are included. If the End of Title Assessor asks why you have emphasised some and not others, you have the chance in that meeting to explain.

What is reflection?

It's not just what happened, but why. In other words, reflection is not simply descriptive. Try to avoid a great deal of detail about what you did, though some will be needed to set the context. More significant is evaluative material, asking key questions like:

- How did it change you?
- What was the progression for people and ministers through this event?
- Where is God in it?
- What biblical resources do you draw on as you reflect?
- What was it about this quality that struck you to start with and what do you think about it now?

How confidential is my portfolio?

The people who will see your portfolio under normal circumstances are:

1. Ordained Ministries Development Officer
2. End of Title Assessors
3. The Diocesan Bishop
4. Your Training Incumbent (if you wish)

Other people who might see it – only if you give permission:

1. External Moderators (IME Advisers from other dioceses)
2. Other Diocesan Mission & Ministry staff
3. Bishop's Core Staff members (Bishop of Repton, Archdeacons, Dean of the Cathedral, Director of Education, etc)
4. Future curates who want to see what a portfolio looks like

To ensure greater confidentiality for some sensitive items, you are free to print something on yellow paper so that the Bishop or your Training Incumbent will not see it. For example, this means that if you wish to reflect on something that your Training Incumbent might feel sensitive about, you can do so confident of confidentiality. ***We will never use your work as an example without your permission.***

GET STARTED ON YOUR PORTFOLIO!

Please note that the overall responsibility for creating your portfolio rests with you. Your portfolio will be one of the three assessment tools considered when it comes to signing your curacy off at the end of your third (or fourth) year and so it is an important document. It **CANNOT** be written in a week at the end of your curacy. You **MUST** give time to it throughout your training phase (this time will build as your curacy progresses). It is unlikely that others will force you to do this, as part of the learning is being able to complete a piece of work over the long-term using your own self-management and self-motivation.

There is no 'set' formula to preparing a portfolio and so you are welcome to put them together in whatever way you think is most logical and helpful to you. I would encourage as much freedom and creativity as possible, from submitting music to fine art for portions of the Qualities (with a written explanation), in a binder or on a website. For some this level of creative freedom is liberating – for others it causes their hearts to sink! So, if you're looking for a 'rough guide', here are some guidance notes that might help.

Portfolios can be submitted in written form in **one A4 Lever Arch ring-binder.**

1. Read through the formational qualities for Ordained Ministry: IME Phase 2 at the end of this guidebook and get familiar with what you're shooting at. Complete your IME2 Curacy Learning Plan.
2. Make sure you go through these guidelines with your Training Incumbent. 'Remind' them of what formational training you need and what evidence you need to produce. (This often makes for a good supervision session). Training Incumbents are good sources of help in pointing you to primary material and so work with them!
3. Consider getting a folding pocket file (like this one [pictured])
4. You could label each section in the following way:



A] Context & Executive Summary of Curacy [500 word max]

Where your curacy was, with whom, what is the context like, what placements, what was your key learning, where do you see your ministry going next, etc

B] Formation Reports

Including ALL Training Incumbent Reports, Lay Reports, School Report and Safeguarding Officer Report, any other interim reports, etc

C] Curacy Training

What sessions you've attended, what training you've done outside of diocese, what books you've read...

D] Formational Qualities

Love for God
Call to Ministry
Love for People
Wisdom
Fruitfulness
Potential
Trustworthiness

E] Supervision

*Please include some examples of your supervision write-up sheets (which can be found on the website).
When you do a supervision, you are invited to complete a supervision write up form.*

F] References, commendations, etc

Include any feedback forms, references, commendations, etc.

G] Any other learning or supporting evidence

Basically, anything else you want to include but doesn't fit in any of the other sections.

Start slowly filling it up with relevant stuff, adding potential material for inclusion along the way – if in doubt, put it in at this stage. Include things like:

- Orders of services
- Liturgies you produced
- Thank you notes
- Assembly outlines
- Sermons, Sermon evaluation forms and reflections
- Photos of you dressed as a Christingle candle, etc ...
- Magazine/ Web articles you've written
- Self-evaluations
- Newspaper/ social media clips
- Agenda / minutes (where you made a significant contribution)
- Etc ...

IT IS MUCH BETTER TO DO YOUR PORTFOLIO AS YOU GO! Little and often.

Mid-curacy

1. Every four to six months, find a couple of hours to go through your file and 'cull' it. In the intervening time you may have done better things that more easily evidence the qualities - archive the older stuff (don't throw it out just yet!) - Get rid of superfluous information (e.g. email trails, car parking permit, rough notes taken at IME study day (unless helpful as evidence), rotas, handouts given to you etc). It may have now become clear to you which section some of the 'hard to place' evidence belongs. Do this alongside your 'master' qualities sheet (this could be your copy of the user guide that you scribble on - crossing stuff out when satisfactorily achieved).
2. Notice which folder is looking thin and neglected - make that your priority for the next few months and actively seek out opportunities to put things in it. Make this a part of your conversation with your Training Incumbent / Area Dean / Ordained Ministries Development Officer.
3. Begin referencing / cross-referencing content - you will need a table of contents at the end of the process and so it's never too early to start!
4. At the end of year 2, there will be an intentional moment to review the portfolio with the Ordained Ministries Development Officer and Training Incumbent to identify if an additional placement will be required in order for you to achieve all your learning outcomes.

Towards submission

1. Relax, this should be easy as 90+% of the work should be done!
2. Do a final review of evidence against qualities - if there are any holes, then make these a priority to fill. If certain experiences are unlikely to come about due to the context of your training parish (*and if you have already tackled this with your Training Incumbent in your deanery*), then do speak to the Ordained Ministries Development Officer and we will seek to arrange a placement/experience elsewhere.
3. Organise each qualities section with your best evidence ensuring only relevant (*and not background or working information*) is provided.
4. Have a final 'cross-qualities' section for evidence that illustrates integrated learning across different qualities. These will mostly come out of your 'I don't know where to put this' folder. Please clearly mark what qualities you're evidencing.
5. Sit back - give thanks to God.
6. Stipendiary curates should submit to their identified End of Title Assessors by the **end of January** in the third year of their training unless agreed otherwise. Deployable SSM's have the option to submit in the January of either their third or fourth years, depending on when they will be ready for assessment.

Please note:

Learning doesn't stop at this point - after formal training is concluded you continue in your curacy in 'consolidation' mode operating in and honing the skills you have gained. This obviously continues through your ministry but will formally conclude when you move to your first post or (for SSM's) are licenced to your parish. At this point, you enter the Continuing Ministerial Development (CMD) and Ministerial Development Review (MDR) process.

*Our thanks to Marietta Forman for proofreading skills and an eye for detail.
Our thanks the Revd Canon Simon Taylor, the Revd Canon Matt Barnes and the Revd Naomi Nixon for some of the content.
Other original sources indicated where known.*

2023-2024 ASSESSMENT CHECKLIST

Year	Doc to Submit	Deadline	Complete
Year 1	The Learning Plan	Work on in first summer	<input type="checkbox"/>
	2 Short Online Courses	Before September	<input type="checkbox"/>
	2 Portfolio Reflections	15.1.24 by Noon	<input type="checkbox"/>
	Lay Report Year 1	1.3.24 by Noon	<input type="checkbox"/>
	Self-Evaluation Report	1.3.24 by Noon	<input type="checkbox"/>
	Safeguarding Training	Before Priested	<input type="checkbox"/>
	Individual Formation Plan on A4	Before Priested	<input type="checkbox"/>
Year 2	Working Agreement	Review annually min.	<input type="checkbox"/>
	1 Short Online Course	Before September	<input type="checkbox"/>
	4 Portfolio Reflections	15.1.24 by Noon	<input type="checkbox"/>
	Lay Report Year 2	1.3.24 by Noon	<input type="checkbox"/>
	School Report	1.3.24 by Noon	<input type="checkbox"/>
	Self-Evaluation Report	1.3.24 by Noon	<input type="checkbox"/>
Year 3+	Working Agreement	Review annually min.	<input type="checkbox"/>
	Individual Formation Plan on A4	Review annually min.	<input type="checkbox"/>
	1 Short Online Course	Before September	<input type="checkbox"/>
	Lay Report Year 3	11.12.24 by Noon	<input type="checkbox"/>
	Safeguarding Officer Report	11.12.24 by Noon	<input type="checkbox"/>
	Portfolio	30.1.24 by Noon	<input type="checkbox"/>