



DIOCESE *of* OXFORD

A Christ-like Church for the sake of God's world

INCUMBENT FOCUS OF MINISTRY CURATES ANNUAL ASSESSMENT REQUIREMENTS

Each year, the annual assessment process consists of 3 stages:

1. You complete your **Annual Review report form** with your Training Incumbent (work may be done on this document throughout the year but there should always be a Review Meeting, whether in person or online, to discuss and finalise it).
2. You compile electronic versions of all the documents referred to below into a **Ministry Development Folder** (MDF) and send a zipped folder with everything to the Head of IME 2 and the Curates Administrator by 10th May each year (ideally signatures should be scanned from hard copies but where this is not possible, electronic signatures are acceptable).
3. Your documents are **reviewed by one of the Bishop's Assessors** who provides a report to the Area Bishop and Head of IME 2 (usually 2–4 weeks after submission).

Year 1 (Deacon Year) Annual Assessment (occasionally still referred to as IME 4)

1. With your Training Incumbent

You and your Training Incumbent should arrange a Review Meeting to discuss your progress during the year (typically one and a half to two hours). At the end of this you should have discussed and completed as fully as possible all of the 7 parts of the *Annual Review Form (End of Year 1 and 2)* showing your progress **to this point** against both the core and potential incumbent Formation Criteria (FC) for curacy. Many will have filled in parts of the form in supervisions throughout the year, others may prefer a longer focused period of writing prior to the Review Meeting itself (Up to date versions of the form and all other documents can be downloaded from the diocesan website <https://www.oxford.anglican.org/mission-ministry/ministry/curates-training-ime-part-2/>). Afterwards, your Training Incumbent should send the finalised version, signed by both of you, to your Area Bishop and the Head of IME 2, along with a letter of recommendation of readiness for ordination to the priesthood (where appropriate). These must arrive by April 30th.

at the latest to allow the bishop time for reflection and their decision. The original should be added to your electronic MDF (see below). You also need to review your progress with respect to the *Practice of ministry: core skills and abilities* Check list (Incumbent-focus), remembering that there is plenty of time to cover things over the rest of the curacy.

2. You need to compile the documents listed below into your electronic MDF and email them as a zipped folder to the Head of IME 2 and the Curates Administrator by 10th May at the latest.

Electronic MDF Documents Needed:

- a. Completed personal information sheet (See Curates Handbook section 10n. *Ministry Development Folder Front page*).
- b. List of contents of your MDF with hyperlinks to other files.
- c. Completed *Annual Review Form (End of Year 1 and 2)* for your diaconal year.
- d. The *Practice of ministry: core skills and abilities* Check list (Incumbent focus), completed as far as you are able at this stage.
- e. Interim Learning Agreement (updated as necessary; if no updates are required, please say so and include the date of review).
- f. Dates of all modular courses you attended during the year (Standard track – typically one per year, at least three by end of curacy; BA/PgDip – typically two per year, five required by end of curacy; Self-directed track curates should note their agreed areas of study for the year).
- g. All reflections or assignments submitted throughout the year, with feedback (where feedback has not yet been received or the assignment is due in the summer, please say so). Standard track – typically 1x 2000-word theological reflection or other assignment(s) per year and three by the end of curacy; BA/PgDip – typically 2x 6000–7000-word portfolios and five by the end of curacy; Self-directed study – typically one piece of writing agreed with Head of IME 2 per year.
- h. A list of the Hard Skills days attended during the year, with dates and completed *Hard Skills Assessment proformas* for each. Incumbent-focus

curates are expected to complete at least 12 days by the end of curacy.

Where you have booked in for a day in the summer, simply note that and state it is still to come.

- i. List of the dates of MDG meetings you attended (or are due to attend) during the year. All curates are expected to attend six per year.

3. Review of your paperwork by one of the Bishop's Assessors

The contents of your MDF are reviewed by one of the team of Bishop's Assessors, and a brief report is compiled for the Bishop, to indicate that the year's required work has been completed (this will be sent to you and your Training Incumbent in due course after moderation by the Head of IME 2 and the regional panel). Please save the report for your Interim MDF submission.

Interim Annual assessment (usually end of Year 2)

1. With your Training Incumbent

You and your Training Incumbent again arrange a Review Meeting to discuss your progress during the year (typically one and a half to two hours). At the end of this you should have discussed and completed as fully as possible all of the 7 parts of the *Annual Review Form (End of Year 1 and 2)* showing your progress **to this point** against both the core and potential incumbent Formation Criteria (FC) for curacy. Many will have filled in parts of the form in supervisions throughout the year, others may prefer a longer focused period of writing prior to the Review Meeting itself (Up to date versions of the form and all other documents can be downloaded from the diocesan website <https://www.oxford.anglican.org/mission-ministry/ministry/curates-training-ime-part-2/>). You also need to review your progress with respect to the *Practice of ministry: core skills and abilities* Check list (Associate focus), remembering that there is plenty of time to cover things over the rest of the curacy. In difficult circumstances where an Interim report is not possible (usually for health reasons or other disruption of training, please contact the Head of IME 2 to arrange an alternative process; a full interim report will usually still be needed one year before the planned end of curacy assessment).

2. As in Year 1, you need to compile the documents listed below into your electronic MDF and email them as a zipped folder to the Head of IME 2 and the Curates Administrator by 10th May at the latest (note that some documents from the first year MDF are included again).

Electronic MDF Documents Needed:

- a. Updated personal information sheet (See Curates Handbook section 10n. *Ministry Development Folder Front page*).
- b. List of contents of your MDF with hyperlinks to other files.
- c. Completed and signed *Annual Review Form (End of Year 1 and 2)* for this year.
- d. Completed and signed *Annual Review Form (End of Year 1 and 2)* for your diaconal year.
- e. The *Practice of ministry: core skills and abilities* Check list (Incumbent-focus), completed as far as you are able at this stage.
- f. Interim Learning Agreement (updated as necessary; if no updates are required, please say so and include the date of review).
- g. Assessor's informal assessment report on your Year 1 folder.
- h. Dates of all modular courses you attended since your Year 1 MDF submission (Standard track – typically one per year, at least three by end of curacy; BA/PgDip – typically two per year, five required by end of curacy; Self-directed track curates should note their agreed areas of study for the year).
- i. All reflections or assignments submitted since your Year 1 MDF submission, with feedback (where feedback has not yet been received or the assignment is due in the summer, please say so). Standard track – typically 1x 2000-word theological reflection or other assignment(s) per year and three by the end of curacy; BA/PgDip – typically 2x 6000–7000-word portfolios and five by the end of curacy; Self-directed study – typically one piece of writing agreed with Head of IME 2 per year.

- j. Completed reflections or portfolio assignments with feedback from your year 1 MDF submission.
- k. A list of all Hard Skills days attended so far, with dates and completed *Hard Skills Assessment proformas* for each. Incumbent-focus curates are expected to complete at least 12 days by the end of curacy. Where you have booked in for a day in the summer simply note that and state it is still to come.
- l. List of the dates of MDG meetings you attended (or are due to attend) during the year. All curates are expected to attend six per year.

3. Review of your paperwork by one of the Bishop's Assessors

The contents of your MDF are reviewed by one of the team of Bishop's Assessors, and a brief report is compiled for the Bishop, to indicate that the year's required work has been completed (this will be sent to you and your Training Incumbent in due course after moderation by the Head of IME 2 and the regional panel). Please save the report for your End of Curacy MDF submission.

End of Curacy assessment (usually end of Year 3 but occasionally delayed to 15th October 15th or 15th February by agreement with the Head of IME 2)

1. With your Training Incumbent

You and your Training Incumbent again arrange a Review Meeting to discuss your progress *over the whole of your curacy*, and your readiness to complete your curacy. At the end of this you should have discussed and completed as fully as possible all of the 7 parts of the *End of Curacy Review Form (Final Year)* showing your progress against both the core and potential incumbent Formation Criteria (FC) for curacy. Many will have filled in parts of the form in supervisions throughout the year, others may prefer a longer focused period of writing prior to the Review Meeting itself (Up to date versions of the form and all other documents can be downloaded from the diocesan website <https://www.oxford.anglican.org/mission-ministry/ministry/curates-training-ime-part-2/>). You also need to review your progress with respect to the *Practice of ministry: core skills and abilities* Check list (Incumbent-focus). Where elements of engagement have not been at the depth

hoped or opportunities for core skills and abilities not possible due to personal or parish circumstances, these should be noted and the Area Bishop will ultimately decide whether these are minor enough to be addressed in future ministry. At the end of the review, your Training Incumbent should state clearly that in their view, you are ready to complete your curacy and move on to your next post (If this is not the case, the annual review should be submitted as a second interim report and a meeting arranged with the Head of IME 2 to explore how best to address this).

2. As in previous years, you need to compile the documents listed below into your electronic MDF and email them as a zipped folder to the Head of IME 2 and the Curates Administrator by 10th May at the latest (note that some documents from previous MDFs are included again and references must also be sought from key laity).

Electronic MDF Documents Needed:

- a. Updated personal information sheet (See Curates Handbook section 10n. *Ministry Development Folder Front page*).
- b. List of contents of your MDF with hyperlinks to other files.
- c. Completed and signed *End of Curacy Review Form (Final Year)*
- d. Completed and signed *Annual Review Forms (End of Year 1 and 2)* for your diaconal year and interim assessment.
- e. The *Practice of ministry: core skills and abilities* Check list (Incumbent-focus), fully completed (with comments addressing any areas of lack of opportunity).
- f. Learning Agreement (final version, updated as necessary).
- g. Assessor's informal assessment reports on your Year 1 and Interim folders.
- h. Dates of all modular courses you attended since your Interim MDF submission (Standard track – typically one per year, at least three by end of curacy; BA/PgDip – typically two per year, five required by end of curacy; Self-directed track curates should note their agreed areas of study for the year).
- i. All reflections or assignments submitted since your Interim MDF submission, with feedback (where feedback has not yet been received or the assignment

is due in the summer, please say so). Standard track – typically 1x 2000-word theological reflection or other assignment(s) per year and three by the end of curacy; BA/PgDip – typically 2x 6000–7000-word portfolios and five by the end of curacy; Self-directed study – typically one piece of writing agreed with Head of IME 2 per year.

- j. The Mission and Ministry Project reflection with feedback (this will take the form of a short description and theological reflection for Standard Track and Self-Directed Study Curates; or a formal module submission and marksheet for BA/PgDip Curates).
- k. Completed reflections or portfolio assignments with feedback from your year 1 and Interim MDF submissions.
- l. A list of the 12 or more Hard Skills days attended, with dates and completed *Hard Skills Assessment proformas* for each. Where you have booked in for a day in the future simply note that and state it is still to come.
- m. List of the dates of MDG meetings you attended (or are due to attend) during the year. All curates are expected to attend six per year.
- n. 2 lay references on *Third Party Reference* forms (including one from a Church Warden or LLM), with a short response from the Curate to each.

3. Review of your paperwork by one of the Bishop’s Assessors

The contents of your MDF are reviewed by one of the team of Bishop’s Assessors, and this time, a final report is compiled for the Bishop, to indicate that you have done all that is required during curacy, with a recommendation that the Bishop signs you off as having successfully completed your curacy.

If in the view of the Assessor, your MDF does not show that you have completed all that is required for curacy, they will complete the ‘not recommended for signing off’ section of the report proforma. As shown in Section 12a. Assessment at the end of curacy flowchart 1 (in the Curates Handbook), if this happens, your MDF will be assessed by a second, different Assessor. Please see the flowchart for next steps.

4. Signing off

If your final assessment recommends that you are now ready to move to the next phase of ministry and a first post of responsibility, you will receive a letter from your Area Bishop signing you off from your curacy. Incumbent-focus curates will usually have already explored possible next posts with their Area Bishop in the autumn of Year 3 and may well already have applied for or even been offered a job subject to sign-off. Where the Curate knows time between assessment and a potential licensing date for a new role is short, they should alert the Head of IME 2 and ask for the assessment to be fast-tracked. This may reduce the 'turnaround' time but will not affect the Assessor's judgement.

As curacy is a clearly defined training position, Curates in the Diocese of Oxford are typically all issued with an initial training licence and Statement of Particulars for four years. It is hoped that stipendiary curates and those seeking incumbent-focus positions will usually have found their next position by Easter in their fourth year and be ready to move before the potential arrival of a new curate that summer. Where this proves difficult, Curates should alert the Head of IME 2 and Area Bishop or Archdeacon who will endeavour to offer support. Sadly extensions to stipendiary licences are not always possible and typically only available to finish a disrupted training process, rather than to allow Curates extra time to find another post.

Curacy Extensions

Curacy extensions are only possible in a limited number of circumstances and no curate should assume an extension request will be automatically granted. Please see the diocesan policy on *Length of Curacy* in the Curates Handbook for the relevant information and detailed process. Typically health issues, maternity leave and curacy issues that have significantly delayed training sign-off will be to the fore, though in rarer circumstances a longer curacy is planned for a Curate from the start and an extension application built into the agreed training plan. In all cases, the Curate hoping for an extension should raise the possibility with their Training Incumbent and the Head of IME 2 before 30th November in their fourth year. If the extension request is supported by

both the Training Incumbent and Head of IME 2, an application is made to the Area Bishop who consults the Archdeacon before making a firm decision.

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