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INTRODUCTION

In 1992, a Handbook for CPM Chairpersons was published by the Office of Preparation for Ministry of the Church Vocation Ministry Unit. Since then, this Handbook has been revised in 1998 and now a new update is needed because of the changes that took place within the Church. The following task force members assisted in the revision of this Handbook:

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In this Handbook, the role of the CPM Moderator and the descriptions of his/her responsibilities for each step of the inquiry/candidacy process are provided. In addition, suggestions for relationships that must be established with other committees and officers of presbytery are also available.

Appreciation goes to Dosie Powell, Senior Administrative Assistant, Churchwide Personnel Services, for countless hours of typing and formatting the first draft of this revised Handbook.

The Role of the Moderator **1**

Congratulations! As the moderator of the Committee on Preparation for Ministry (CPM) you have answered a call to ministry by your presbytery and will work with others who are also called. You are probably wondering:

What am I getting into?

Where do I start?

Who and where is my support?

What do I need to know?

This Handbook is designed to help you get started and guide you along the way of your service as moderator of your presbytery's CPM. Other resources are available. Some are listed in the appendix of this Handbook; others will be given to you by the previous moderator, the presbytery office, the Committee on Ministry, and the Office of Resourcing Committees on Preparation for Ministry. Among the resources you will need are:

1. *The Constitution of the Presbyterian Church (U.S.A.) Part I - The Book of Confessions*, and Part II- *The Book of Order*;
2. A copy of your presbytery's operating procedures;
3. Minutes of previous meetings of the CPM;
4. A roster of CPM committee members;
5. A roster and files for the presbytery's inquirers and candidates;
6. Copies of denominational forms used by the CPM;
7. Material sent by the denominational offices, newsletters, forms, reports, pastoral letters, etc.;
8. The budget for your committee and information about how it is developed: contents (committee travel expense, meeting expenses, scholarships available from presbytery and congregations, costs of annual consultations, costs for Standard Ordination Exams, etc.), and how disbursements are made;
9. Presbytery actions and policies related to the CPM;
10. The Preparation for Ministry video and copies of the Manual *Preparation for Ministry in the Presbyterian Church (U.S.A.)* (see Appendix VI - Resources);
11. Roberts' Rules of Order;
12. Catalogues of theological institutions;
13. Directory of Theological Institution Contact Persons;
14. Financial Aid Program brochures;
15. SEIC (Study to Enrich Inquirers and Candidates) materials (see Appendix VI).

When your term of office as the CPM moderator is over, the above materials, along with this Handbook, should be given to the person who succeeds you.

As the moderator of your presbytery's CPM, you will discover that the effectiveness of the committee will depend a great deal on your own effectiveness. Making the best use of the gifts, strengths, interests, knowledge, and varied theological positions held by you and the committee members depends on how you relate to them and they relate to each other. Take time to reflect with the committee on how issues are to be handled and decisions made. Invite feedback and creative alternatives to issues and procedures of the past and allow the committee to "live into" this new relationship and challenge.

Sudden and drastic changes in procedures, no matter how worthy or needed, may be resisted unless committee members have had a part in their development. The committee must, therefore, take the time and make the effort to care for itself amid the crush of many meetings, timelines, forms to complete, and others to care for. You will need to make room in the committee's schedule for spiritual renewal, member re-creation, and committee development. Challenge the committee to seek their own care and growth.

You will find that careful preparation of meetings and agendas avoids the danger of clustering "heavy" issues in one place and thus overloading the committee. A good agenda creates a balance among the issues and concerns to be addressed that speaks positively to your leadership style. Among the items that will be regularly on the agenda of the moderator are:

- Training and nurturing the committee in the areas of discernment and spiritual formation;
 - Integrating new committee members;
 - Dealing with issues of trust and confidentiality;
 - Learning to say "no" to an inquirer or candidate;
 - Forming committee protocol for strategic times in the process;
 - Educating the presbytery and the churches on issues/process for preparation for ministry;
 - Demonstrating pastoral sensitivity toward committee members, inquirers and candidates, pastors and sessions;
 - Developing and utilizing the criteria needed to determine the successful completion of each step in the process;
 - Dealing with the demands for time, paperwork, and meetings;
 - Examining critically the structure and organization of the committee for effectiveness.
- Good subcommittees contribute to a lighter load and fewer headaches for the moderator.

This Handbook, with the Manual and the *Book of Order*, provides specific help as you lead the committee through the process for each applicant who comes before you. **Your presbytery or synod may provide training for new moderators. If not, please urge your presbytery (Executive or General Council) to do so or to provide alternatives for training.**

Now let us move on to the process itself. The following chapters provide guidance as you move through the various steps. Each chapter begins with steps, taken from the Preparation for Ministry Manual Flow Chart (see Appendix VII), to be addressed in that chapter. You will also find special *Alerts* to call attention to important messages or concerns that must not be missed. A *What do you do?* section is included as well to highlight specific actions to be accomplished or assigned to complete implementation of each step.

Beginning the Process: 2

Application and Enrollment for Inquiry

Steps 1-6

- Step 1 - Applicant is an active member of sponsoring congregation for at least six months.
- Step 2 - Session notifies CPM of applicant.
- Step 3 - CPM representative meets with session for session orientation.
- Step 4 - Session interviews applicant, makes recommendations to CPM/presbytery, chooses session liaison.
- Step 5 - CPM interviews applicant, makes recommendation on enrollment as an inquirer, appoints CPM liaison.
- Step 6 - Presbytery enrolls inquirer.

STEP 1

Applicant is an active member of sponsoring congregation for at least six months.

Before you, as moderator of the CPM, take any actions regarding an applicant, become familiar with the five key areas that will be used to nurture and test the applicant's development through the entire process. These key areas are (1) Education for Ministry; (2) Spiritual Development; (3) Interpersonal Relations; (4) Personal Growth; and (5) Professional Development (see Manual, page 5, for a more detailed description of areas).

A member of a Presbyterian congregation applies to the session to become an inquirer. The applicant must have been a member of the congregation for at least six months. It is the responsibility of the pastor, session, and congregation to communicate with and support those who wish to formally pursue their call to the ministry of the Word and Sacrament.

When session contacts the CPM regarding an applicant for the inquiry phase...

What do you do?

STEP 2

Session notifies CPM of applicant.

- A. This is the point at which the CPM becomes active. Receive from the pastor, clerk of session, the presbytery executive, or the applicant information, concerning the applicant's desire to explore the implications of preparing for the ministry of the Word and Sacrament.
- B. Arrange a meeting with the session for orientation. Decide who from the CPM will meet with them. Some committees have members

trained for this task. Prior to the meeting, negotiate with the session moderator and/or the clerk of session for adequate meeting time on the session agenda (30-45 minutes minimum).

- C. Preview the Preparation for Ministry video (see Appendix VI - Resources) and arrange for the session to view appropriate sections.
- D. Prior to meeting with the session, send **Form 1 (Application for Inquiry: Background Information for Session)** to the applicant to be completed and forwarded to the moderator or clerk of session before the CPM meets with them. (Forms are available from the Presbyterian Church (U.S.A.) web site, the presbytery office or the Presbyterian Distribution Service.)

A time is set to meet with the session for orientation...

What do you do?

STEP 3

**CPM
representative
meets with
session for
session
orientation.**

- A. The CPM should discuss with the session the meaning of call and ministry as viewed by churches holding to the Reformed tradition (see *Book of Order*, G-6.0100, and the Preparation for Ministry Manual, pages 3-4).
- B. It is the responsibility of the CPM to encourage the session to test the validity of the applicant's call.
- C. The CPM should interpret to the session the preparation process in its entirety, including: the requirement of at least two years as an inquirer/candidate, the presbytery's and the Committee's calendars for consultations and actions, financial considerations, and denomination expectations and presbytery policies and procedures (G-14.0303c, G-1.0302).
- D. Leave copies of the Manual, forms, and information about the CPM video with the session moderator or clerk.
- E. **Form 1** should have been completed by the applicant and in the hands of session before the meeting. Remind all participants to use appropriate standards of confidentiality since **Form 1** contains personal information.
- F. Suggest that the session use page 24 of the Manual, "Some Issues for Attention and Evaluation by the Session When Examining the Gifts and Motivations of a Prospective Inquirer," and page 20 of the Manual, "Roles of Session."

Alert

The session has the option to receive or not to receive the applicant; to make or not make a decision regarding applicant on the day of the interview; to conduct one or more interviews before making a decision. Be sensitive to special concerns the session may have about the applicant's gifts, intentions and sense of call. Discuss with the session the necessity for objectivity in their interview with the applicant, and encourage them to meet without the applicant present when voting on the application.

If the session approves the application...

STEP 4

Session interviews applicant, makes recommendations to CPM/ Presbytery, chooses session liaison.

What do you do?

- A. Be sure the session is aware that, following the interview, they must take the initiative to complete and send all papers to you, including the name and address of the session liaison.
- B. **Form 2A (Application to be Enrolled by Presbytery as an Inquirer)** should be completed and sent by the session to you with the name and address of the session liaison.
- C. Be sure that the session is aware that following the process used in the presbytery, the CPM will make an endorsement to either enroll or not to enroll the applicant.

The CPM arranges to interview the applicant...

What do you do?

STEP 5

CPM interviews applicant, makes recommendation on enrollment as an inquirer, appoints CPM liaison.

- A. Arrange for the applicant to meet with the CPM and distribute copies of the completed **Form 1** to all members of the CPM.
- B. Remind the committee of the goals of the interview:
 - 1. To discuss the nature and theology of call;
 - 2. To begin to discern the nature of the applicant's sense of vocation;
 - 3. To determine whether the applicant has the potential and the qualities necessary for ministry of the Word and Sacrament;
 - 4. To prepare the applicant for the highly evaluative period of inquiry (or offer suggestions for other vocations);
 - 5. To make certain that the applicant understands that the preparation process is the beginning of a relationship spanning two years or more that will determine one's fitness for ministry, that will assess one's growth in five areas of ministry, and a time of exploration of the validity of the call, and a further time, if the way be clear, for actual preparation for a call.
- C. Review and recommend the use of the SEIC (Study to Enrich Inquirers and Candidates. See Appendix VI on Page 58) materials as resources when appropriate, such as:

- #101 Considering Your Call and Vocation;
 - #102 Primary Qualities for Professional Ministry;
 - #103 Vocation as a Journey for Life;
 - #104 Preparation for Ministry: The Process;
 - #105 Dialogue with CPM Members.
- D. Appoint a person or team from the committee to be liaison between the inquirer and the committee.
 - E. Consult with the presbytery stated clerk as you prepare the recommendation concerning the action of the CPM for presentation to presbytery.
 - F. Ensure that **Form 2A and Form 2B** are completed and sent to the stated clerk.

Alert

If the CPM decides not to recommend the applicant to the presbytery for enrollment as an inquirer, the committee should prepare for counseling as soon as possible with the applicant, the pastor, and the session regarding its action.

The CPM decides to recommend to presbytery that the applicant be enrolled as an inquirer...

What do you do?

STEP 6

Presbytery enrolls inquirer.

- A. Be sure all paper work is completed on **Forms 1, 2A, and 2B**.
- B. Check to see whether your presbytery has taken action to permit the CPM to act on the presbytery's behalf. (See G-14-0302e.)
- C. Arrange with the stated clerk of presbytery for time on the docket of a convenient stated meeting for presenting the committee's recommendation concerning the applicant.
- D. Attend or designate a CPM member to attend the presbytery meeting and report the action of the CPM.
- E. Decide whether to invite the applicant to be present at presbytery meeting (although he or she is not officially presented to presbytery).
- F. Upon presbytery action the applicant is officially enrolled as an inquirer
- G. Begin an official file on this person.

The applicant is now an inquirer, and your task is to continue to work with the person through the next stages of the process. The following chapter in this Handbook deals with your responsibilities regarding the inquiry phase of the process.

Step 7

Step 7- Review of preparation process and progress. Develop covenant agreement for guidance, goals, consultations, and reports.

“The purpose of the inquiry phase is to provide an opportunity for the church and for those who believe themselves called to ministry of the Word and Sacrament to explore that call together in such a way that a decision regarding the inquirer’s suitability for ministry of the Word and Sacrament will be based on knowledge and experience of one another.” (*Book of Order*, G-14.0302).

The covenant relationship established in this phase requires that you develop with the inquirer a mutual trust and that you be honest with each other, especially during this phase, be it a year or more, for it is a crucial time in the inquirer’s preparation for ministry. One presbytery developed a practice to interview prospective inquirers in retreat setting where questions for reflection about one’s faith journey were addressed by both the applicants and the CPM members. The quality and the depth of this sharing of personal faith help to build trust among applicants and CPM members.

Your CPM has a new inquirer on its roll...

STEP 7
Review of preparation process and progress. Develop Covenant Agreement for guidance, goals, consultations, and reports.

What do you do?

- The moderator is responsible for seeing that the following is accomplished:
- A. Appoint a committee liaison; develop Covenant Agreement; and determine timelines for future meetings.
 - B. Encourage the inquirer to explore his or her call to the ministry of the Word and Sacrament from as many perspectives as possible.

Alert

The Presbyterian Church (U.S.A.) is firmly grounded in the Reformed tradition in its relationships with men and women who feel themselves called by God to be ministers of the Word and Sacrament. As you explore with them their sense of vocation and the procedures leading to ordination, be sure that this tradition is clearly understood and that they are willing to abide by it as it is expressed in the *Book of Order* requirements for the ordination process outlined in section G-14.0400 (also see Manual, pages 4-5).

- C. Encourage the inquirer to engage in as many challenging activities as feasible during this phase, including:
 - 1. Field work (if attending seminary), preferably not in the home congregation (see G-14.0307).
 - 2. Church-related employment in the summer;
 - 3. Involvement in the life of a Presbyterian congregation;
 - 4. Volunteer work in a local church, hospital, or other agency;
 - 5. Shadowing: The inquirer may be encouraged to accompany a pastor to meetings, on hospital calls, to community events, and so forth, for several weeks for observation and future discussion and debriefing;
 - 6. Attendance at governing body meetings or special events.
- D. Help the inquirer understand the realities of the current job market and the decreasing size of congregations in the Presbyterian Church (U.S.A.): the majority now average under 200 members.
- E. Remind the inquirer to supply full written reports from all those involved in supervising any of the activities listed above. Included in the reports should be: a statement of the expectations of the supervisor; how well these were fulfilled by the inquirer; and an evaluation of the inquirer's gifts for ministry.

Alert

Keep in mind that all of the above is intended as an opportunity for inquirers to experience a variety of both the satisfactions and the frustrations that are regularly faced by pastors. In addition, these experiences provide both the CPM and the Inquirer with helpful evaluations of the inquirer's skills, strengths and weaknesses, and areas of needed growth.

Questions may be raised in your committee about the validity of the call and/or the suitability of an inquirer for the ordained ministry...

What do you do?

- A. Review the responsibilities of gatekeeping and nurture with the members of your CPM. Gatekeeping is a major function of the CPM. The committee has this task, for it holds the authority to decide who is and who is not to be recommended to the presbytery for ordination. Do not let the pastoral concerns for an inquirer deter you from your responsibilities, for the inquiry phase is a time for complete honesty among the members of the CPM and the Inquirer.

This function is truly critical because, even in this time of diminished influence of the church upon society, the power of the ordained clergyperson to impact, for good or for ill, the lives of church people, individually and as congregations, is too often unrecognized.

- B. Face issues and concerns related to inclusiveness in a direct manner balancing the committee's gatekeeping function and nurturing practices. Inquirers and candidates have become increasingly more diverse in age, gender, race, previous experience, and increasingly open in regard to sexual orientation. Uncritical support of enrolled persons may backfire when circumstances dictate that a different, more critical judgment must be brought to bear by the CPM.

After encouraging the inquirer through a time of exploration in which growth and change are apparent to the CPM, and knowing that a three-year \$20,000 debt load has accumulated, the committee may find it difficult to agree that the red flags outnumber the green lights enough to warrant withholding a recommendation for candidacy.

When there are early and undeniable indicators suggesting that a person should not be recommended to continue in the process or to advance to the next phase, it is kinder that the person know this as soon as possible rather than later.

If your CPM recommends the inquirer for advancement, the "gate" has been opened, and, under ordinary circumstances, it will not be closed at a later date. Gatekeeping decisions should ordinarily be made before the candidacy phase.

C. Factors to discuss:

The Presbyterian Church (U.S.A.) has traditionally required its ministers of the Word and Sacrament to be not only well educated and equipped to preach and teach the scriptures effectively, but also to be well-rounded persons of faith and commitment. The difficulties of the gatekeeping task include:

1. The affirming response of most sessions to those who indicate a call to the ministry is often so uncritical that the home congregation of an inquirer will not understand a rejection by the CPM;
2. In early consultations, the CPM sees the inquirer's potential and wishes to be open to the leading of the Holy Spirit in the hope that any problems can be resolved during the candidacy phase; however, by acting neither early nor decisively to address identified problems, the CPM is merely postponing the day of reckoning that must come for the committee and the person enrolled.
3. If a person asks the CPM to enter the inquiry phase late, perhaps even after graduation from seminary, the CPM may be unwilling to turn down the person in consideration of the time, energy, and money already expended;
4. As indicated above, applicants will come to your committee from a variety of backgrounds and with a variety of needs. Recognize that there may be persons who have difficulty finding positions in the PC(USA) for reasons of race,

language, sexual orientation, finances, physical condition, and so on. Examine this reality with applicants as you explore with them their call.

Your CPM decides to recommend removing the inquirer from the covenant relationship (G-13.0312)...

What do you do?

- A. Review with your committee the policies, procedures, and style for this action to recommend terminating the covenant relationship. Be supportive and caring to the inquirer during this difficult time.
- B. Explain as clearly as possible why the decision has been made, emphasizing the person's strengths well as indicating the weaknesses and shortcomings that led to the decision.
- C. Offer suggestions through a group discernment process for alternative occupations that the person may wish to consider, including persons to contact, resources, and so forth.
- D. Contact the pastor of the person's home church and the session liaison as soon as possible to explain the action to be recommended to the presbytery, since it may be unexpected. Tell them the reasons for the committee's action, give them the alternatives that were suggested, and offer any other suggestions you may have about how they can be most supportive of the rejected inquirer.
- E. Recommend to presbytery the CPM's action regarding removal of the inquirer from the covenant relationship. Following presbytery's action, be sure that the stated clerk completes **Form 7 (Report of Transfer, Withdrawal, or Removal of Inquirer or Candidate)** and mail it to the Office of Resourcing Committees on Preparation for Ministry in Louisville.

Your CPM is to meet with someone who has been an inquirer for three years, and has not requested to move to candidacy...

What do you do?

- A. Keep in mind that the provision of “sufficient time” for inquiry is at the heart of the current process. This is another occasion for serious consideration of the validity of the person’s call to ministry.
- B. Consider developing a policy, if there is not one already, concerning the length of time persons may continue under care in your presbytery, and how the time in the two phases should be divided. (One presbytery allows a maximum of five years, with not more than three years in either phase. Another presbytery allows six years total.)

Your CPM is to discuss the motivations and/or mental stability and psychological fitness of an inquirer...

What do you do?

Recommend to the CPM that all available evaluative tools be used.
These include:

- A. Assessments by professional career counseling centers that work almost exclusively with church professionals. Some synods share the cost of these assessments with the presbytery, the inquirer, and his/her congregation providing the remainder;
- B. Clinical Pastoral Education (CPE) or a similar approved program that may be helpful to the inquirer. These programs vary in length and format. For information about those in your area, write The Association for Clinical Pastoral Education, 1549 Clairmont Road, Suite 103, Decatur, GA 30033-4611, (404) 320-1472.
- B. Evaluation by a professional psychiatrist, educational psychologist, or other certified person in whom the CPM has confidence.

In some presbyteries, the use of these evaluative tools is required; some CPMs simply encourage their inquirers to make use of them (G-14.0303f). In recent years, the concern about mental health of those preparing for ministry of the Word and Sacrament has been raised by our Board of Pensions. It is unwise for presbyteries not to use these evaluation tools.

Alert

Reports from both counseling center staff and CPE supervisors as well as transcripts from educational institutions, need to be treated with **the utmost confidentiality**. These documents should be shared only with the permission of the inquirer. For legal and security reasons, after the committee has considered the material, some CPMs destroy any copies except the originals, which are kept in the inquirer's confidential file for transmittal at a later time (with the candidate's permission) to a calling presbytery. Since these evaluations can provide the CPM and the inquirer with data that go beyond superficial impressions, it is most important that they be done during the inquiry phase, rather than during the candidacy phase, in case there are truly significant and potentially serious problems that need consideration.

It is time for the inquirer to meet with the CPM for the annual consultation...

What do you do?

- A. Send a copy of **Form 3 (Pre-Interview Annual Consultation Report)** to the inquirer at least a month in advance, with a notification of the time and place of the annual consultation.
- B. Schedule a face-to-face meeting if at all possible, either with the entire CPM or at least two or three members, including, where possible, the moderator and the CPM liaison. (NOTE: If meeting with the inquirer in person is not feasible, a CPM member traveling in the area may arrange to meet with the inquirer. The CPM moderator or someone on the presbytery staff in the inquirer's location might be asked to conduct the consultation for the committee. Another alternative, though not preferable, is a conference telephone call with several members of the committee and the inquirer.) Some presbyteries conduct annual consultation with all inquirers and candidates in a two-day retreat.
- C. Arrange to pay the expenses of the inquirer to the consultation, including child care, if needed (G-14.0309a). If the inquirer is attending school at some distance from your presbytery, try to arrange a consultation for a time when she/he will be in your area or buy her/him a plane ticket.
- D. Schedule at least one hour for the consultation with additional time for the CPM to discuss in advance the

- papers presented by the inquirer. Identify any special concerns that may need prior discussion by the CPM.
- E. Decide who is to conduct the consultation and prepare the report (**Form 4 – Report of Annual Consultation**). Allow time for prayer with and for the inquirers and their families at some time during the consultation.
 - F. Become familiar with section G-14.0303g (1-6) of the *Book of Order* so that you may be clear about the requirements of the PC(USA) and about the expectations of the committee and presbytery that must be met by the end of the inquiry phase.
 - G. Be prepared in advance to help the inquirer plan to move from his or her present place in the process to the next steps. Make arrangements for this information to be shared in writing following the consultation. It may be included in the report of the consultation prepared by the CPM liaison.
 - H. Discuss the financial status of the inquirer, encouraging openness about current needs, projected debt load, plans for repayment, scholarship possibilities, and so forth. (NOTE: This is a critical part of the consultation since so many seminary students will graduate with considerable debt and with the prospect of existing on a low salary for several years.)
 - I. In order to avoid any surprises in the future, when a CPM liaison has been recently appointed, determine with the inquirer what arrangements, promises, or advice was given by the previous liaison.
 - J. Be sure that the inquirer signs a copy of the Report of the Annual Consultation form that will be sent to the session liaison to the theological institution's contact person (see the "Directory of Theological Institution Contact Persons" sent twice a year from the Office of Resourcing Committees on Preparation for Ministry in Louisville).

Checklist of Essential Papers for Inquirer's File

Be sure that the following papers are in the inquirer's file:

- Covenant Agreement (**Form 2B**)
- Copies of the six written statements described in G-14.0303g
(NOTE: Copies of these statements are to be sent to the session liaison)

with the request that they be considered by the session before it acts to endorse the inquirer to move to candidacy.);

- Reports of all annual consultations, including transcripts and field work evaluations;
- Scores on Ordination Examinations;
- Copies of requests for scholarships or financial aid;
- Application papers originally sent to the session and the CPM;
- Special papers concerning exemptions, etc.;
- All forms required by the preparation for ministry process to this point;
- Any additional materials required by your presbytery.

Application and Enrollment for Candidacy **4**

Steps 8-11

- Step 8 Inquirer applies to become a candidate through session.
- Step 9 Session confers with inquirer. Reviews evidence of inquiry phase and makes recommendation to CPM/presbytery.
- Step 10 CPM confers with inquirer, reviews evidence of inquiry phase, and makes recommendation regarding candidacy.
- Step 11 Presbytery receives CPM recommendation and examines inquirer.
Presbytery receives and enrolls as candidate.

Steps 8-11 are a transitional phase between inquiry and acceptance into candidacy. Many presbyteries view this step as the most important move in the process. It is here where it needs to be determined if the inquirer has the gifts and abilities to serve the church well. If the conclusion is that they do not, this is the place where the “gatekeeping” role is more easily exercised.

When the inquirer applies for candidacy...

What do you do?

STEP 8

Inquirer applies to become a candidate through session.

- A. Be sure that the inquirer has completed **Form 5A (Application to be Received as a Candidate)** and has submitted it to the session of his or her church. This should include the six statements required by the Book of Order (G-14.0303g). A copy should be placed in the person’s file.
- B. The session should be encourage to examine the inquirer using the six statements as a starting point.
- C. Wait for the session action to be communicated to you.

The session has made a recommendation to the CPM regarding the inquirer’s application to become a candidate...

What do you do?

- A. Through the session liaison, provide the session with information

STEP 9

Session confers with inquirer. Reviews evidence of growth within the five areas of competence and makes recommendation to CPM/Presbytery.

requested that will enable the members to assess the applicant's progress during the inquiry phase, remembering to use appropriate standards of confidentiality.

- B. The inquirer may ask the session:
 - (1) to advance to candidacy,
 - (2) to remain an inquirer for another year, or
 - (3) to withdraw from the process.
- C. Receive **Form 5A** from the session with its recommendation concerning the inquirer.

The session has recommended that the inquirer be advanced to candidacy...

STEP 10

CPM confers with inquirer, reviews evidence of inquiry phase, and makes recommendation regarding candidacy.

What do you do?

- A. Receive **Form 5A** from the session and schedule a meeting with the inquirer, the session liaison, and the CPM.
- B. Review with the inquirer and the CPM
 - 1. The annual consultation and the six statements required in the Book of Order.
 - 2. The covenant relationship and, in the case of a request to move to candidacy, begin to establish a new Covenant Agreement.
- C. The CPM has the responsibility to recommend one of the following actions to presbytery:
 - 1. To continue the individual as an inquirer;
 - 2. To withdraw or remove the individual from the process;
 - 3. To recommend that the individual be enrolled as a candidate (only the presbytery can enroll).

Alert

In some cases, the CPM may, after prayerful deliberation, decide that an inquirer or candidate should not be continued in the process. This decision can be traumatic for many of the people involved. Thus, it is important to handle this situation in a forthright yet compassionate manner. The CPM needs to be clear and honest with the inquirer/candidate about the reasons why the decision was made, allowing the inquirer/candidate a chance to respond. After the meeting, these reasons should be put in writing and sent to the inquirer/candidate. As soon as is feasible a call should be made to the pastor of the inquirer/candidate's home church to explain the CPM's action and offer to have further conversation about the decision. An offer should also be made to send a representative from the CPM to the session to answer questions. All of this should be done with the utmost pastoral sensitivity, all the while observing appropriate standards of confidentiality. The proper handling of a dismissal can go a long way toward defusing a potentially volatile situation.

An individual may be dropped from the process because the period of “sufficient time” has elapsed (G-14.0303f). A presbytery, or the CPM with presbytery agreement, may define “sufficient time” as it decides in its policies. Some presbyteries set three years as sufficient time for the inquiry phase.

The CPM has voted to recommend the inquirer to the presbytery for examination and enrollment as a candidate...

What do you do?

STEP 11

Presbytery receives CPM recommendation and examines inquirer. Presbytery receives and enrolls as candidate.

- A. Consult with the stated clerk of presbytery for time on the docket of a meeting convenient to the CPM, the presbytery, and the inquirer.
- B. Inform the inquirer of what may be expected of him or her at the meeting of presbytery. There should be no surprises.
- C. As moderator of CPM you will ordinarily present the inquirer to the presbytery for enrollment. Before you introduce the inquirer, it is important that you set the boundaries of the examination by identifying the three areas to which the questions are limited: personal faith in Christ, their understanding of their sense of call, and any work experience in the church that has confirmed their understanding of call.
- D. Make a check list of:
 - Papers that will be needed;
 - Persons who will be involved (some may need to be invited or reminded to attend);
 - Dates, times, place, and so forth;
 - What will the presbytery be told about the inquirer—personal history, academic history, church membership, future plans?
Have the statement of faith and description of the call been prepared by the inquirer? What questions from presbyters may be expected?
- E. Some presbyteries give a symbolic gift to the new candidate: a current *Book of Order*, a Bible, a *Mission Yearbook for Prayer and Study*, the Presbyterian symbol. Whatever the practice in your presbytery, you will wish this to be a positive and celebratory experience for the candidate, the presbytery, and your committee.

Alert

You should ascertain at the beginning of your term of office the dates and locations of all stated meetings of the presbytery and the time on the docket allotted to your committee. Inquirers who hope to become candidates should also have this information.

Step 12

Step 12 - Review of preparation process and progress. Develop covenant agreement for guidance, goals, consultations, and reports.

After presbytery votes to approve a person to become a candidate...

What do you do?

STEP 12

Review of preparation process and progress. Develop Covenant Agreement for guidance, goals, consultations, and reports.

- A. At the appropriate time, schedule annual consultations to review the candidate's progress. **Form 3 (Pre-Interview Consultation Report)** should be provided the candidate and should be submitted to the CPM before the annual consultations.
- B. **Form 4 (Report of Annual Consultation)** should be prepared following the meeting and kept in the candidate's file. It contains goals in each of the five areas of competence for the following year. Some CPMs send **Form 4** to the candidate so that the candidate may suggest goals for the next year.
- C. Discuss and give approval to plans for some form of field education for the candidate.
- D. Discuss with the candidate progress in meeting course requirements in an accredited theological institution, including requirements for competency in Hebrew and Greek (G- 14.0310c).

A new Covenant Agreement is to be established with the candidate...

What do you do?

- A. Establish a new Covenant Agreement, as the agent of the presbytery, with the candidate. In this covenant, the presbytery agrees to provide care and supervision to the candidate, including:
 - 1. Oversight and guidance in course selection in seminary;
 - 2. Fieldwork assignments, including CPE, psychological and/or vocational testing;
 - 3. Spiritual development;
 - 4. Financial counseling and assistance (G-14.0306). The candidate's session should be reminded that they may be called upon to provide some financial assistance , and/or to help the candidate plan his or her financial matters.

- B. Include specific agreements in the covenant regarding the five key areas of development (see Manual, Page 5).
- C. Report major themes of the covenant to the presbytery as a party in the agreement. The session and session liaison should also be made aware of the essential themes in the agreement
- D. Remind the candidate periodically (at annual consultations, for example) of the expected outcomes of candidacy (see Manual, page 8) and the requirements for certification for a call (see Manual, pages 8- 9).

Steps 13-16

- Step 13- Presbyteries' Cooperative Examinations.
- Step 14 - CPM conducts a final assessment of candidate's readiness to receive a call.
- Step 15- CPM recommends candidate to presbytery to be certified ready to receive a call.
- Step 16 - CPM approves circulation of Personal Information Form to explore obtaining a call.

You have a candidate ready to take the Standard Ordination Examinations...

What do you do?

STEP 13

**Presbyteries'
Cooperative
Exams.**

- A. Develop a calendar to guide the candidate through the final year of seminary and on to a call and ordination (see Appendix II). With the exception of the Bible Content examination, usually taken in the first year of seminary, the remaining four ordination examinations are ordinarily taken at the beginning of the senior year of seminary.
- B. The Bible Content Examination is offered once a year on the first Friday in February. The CPM does not need to grant authorization for individuals to take this exam. Copies of registration forms to take exams are sent to CPM moderators each spring (in May). Registration forms may also be printed from the PC(USA) web site at www.pcusa.org/oga/conserv.htm **Payment for each examination is due at the time of registration.**
- C. The four Standard ("Senior") Ordination Examinations are offered twice a year, currently in September and in February. These examinations are intended for inquirers/candidates who have completed the equivalent of two full-time years of theological education. **The CPM must grant permission for inquirers/candidate to take these exams, and the CPM moderator or his/her designee must sign the registration form to verify authorization.**
- D. The CPM moderator must also give written permission for an inquirer/candidate to take fewer than four exams the first time the individual registers for these exams. Should candidates fail one or more of the exams, they are to submit a new and duly authorized application form for **EACH** exam sitting.
- E. You may be asked to suggest, to your nominations committee, names of persons who can read and grade the examinations and who will be elected by presbytery.
- F. Since candidates are expected to pay for taking the examinations, and since this cost may present a difficulty for some, you may wish in a discreet manner

to determine if this is the case, and to provide some assistance from CPM funds or from funds that may be available from the candidate's session.

- G. You should receive copies of the completed examinations from the candidate. If examinations are not received you should contact the candidate. With the committee, review these and the comments of the readers. These will be of help to you as you guide the candidate through the remainder of the process. These should be placed in the candidate's file.

You have a candidate who has failed one or more of the examinations...

What do you do?

- A. Review the section of the *Book of Order* (G- 14.0313b) that relates to this situation.
- B. Consult with the candidate and consider suggesting additional study with a tutor before the examinations are taken again. This action helps to fulfill your covenant responsibility. If the candidate fails one or more of the examinations a second time, you may wish to be more directive by suggesting additional course work, reading, and tutoring. A second failure is serious and may disrupt the process.
- C. Review the appeal and exemption process described in the *Book of Order* (G- 14.0313b), and use only after appropriate counsel with the candidate about the situation and reasons for failure.

Alert

Not every graduate of a theological institution will pass the Standard Ordination Examinations. In such cases, you and the CPM will need, prayerfully, to discuss whether the person in question is an appropriate candidate for ordination. Such discussion should include these questions: Can you advocate to the presbytery for a candidate on the basis of your knowledge of his or her abilities? Will you ask the candidate to continue the process for another year of study, internship, or secular work all undertaken under the supervision of the CPM and, after a year, to appear for another review and evaluation? Will you recommend that presbytery end the candidacy? These are difficult questions; you may want to consider using the group discernment model to help the candidate and the CPM discern the will of God at this time. Your addressing these difficult questions in your role as a caring gatekeeper contributes significantly to the future of the church.

The candidate has successfully passed the Standard Ordination Examinations...

What do you do?

- A. File copies of the examinations, grades, and comments of readers in the candidate's file.
- B. Confer with the candidate on the next steps of the process: final assessment, preparing and circulating the Personal Information Form, examination and ordination, the first call. Note these on the calendar and set dates for each of them as far ahead as possible (see Appendix II- Planning Calendar).
- C. Contact the appropriate person in the candidate's theological institution to be sure all final grades, transcripts, and so forth are forwarded to you as soon as possible after graduation. This also applies to fieldwork supervisors and others who may be involved in the preparation.

Alert

Completing seminary requirements and the graduation ceremony may not coincide for candidates who do not complete their work during the spring semester. The CPM should plan in advance to deal with these circumstances. It is important to hold firm on presbytery time requirements for each part of the process.

You have a candidate who has completed all of the requirements and is ready for final assessment...

What do you do?

STEP 14

CPM conducts a final assessment of candidate's readiness to receive a call

- A. Prepare the CPM to conduct the final assessment. The date and place should have been on the planning calendar so that the committee and the candidate are present and sufficient time is available.
- B. Review with the candidate how all requirements of the *Book of Order* and the presbytery have been met. The candidate's file contains reports from the theological institution, the liaisons, fieldwork supervisors, psychological and vocational assessments, annual consultations, and so forth. It is helpful for the candidate's session liaison to be present to give support.

Alert

If the committee should determine that the final assessment is not adequate, the candidate is not certified and may not proceed to accept a call. This decision of the committee can be traumatic again for the candidate. It is important to address this situation in a forthright and yet compassionate manner. The CPM needs to be clear and honest with the candidate about the reasons why the decision was made, allowing the candidate a chance to respond. It is also helpful for the session liaison to hear the committee's reasons and prepare the home church to offer support. Recommendations for completing the process should be made and agreed to by the committee and candidate, and the agreement signed by both parties. Others for whom the revised time line may be a matter of concern should be notified as early as possible to avoid any embarrassing situations.

- C. When the final assessment has been completed to the committee's satisfaction, a summary of the assessment shall be reported to the presbytery (0-14.0310a).

When a candidate is ready for certification...

What do you do?

STEP 15

CPM certifies candidate ready to receive a call and reports to presbytery

- A. When the final assessment has been completed and all committee requirements have been satisfied, the candidate is certified by the CPM as ready to receive a call. The candidate's certification is reported to presbytery (G-14.0310a).
- B. **Form 6 (Summary Report of Candidate's Final Assessment of Readiness to be Examined for Ordination)** should be completed (indicating that the final assessment has been completed and the candidate certified ready to be examined for ordination) and placed in the candidate's file. Upon request of a calling presbytery, the candidate's file that includes **Form 6** is transmitted.

When a candidate is ready to circulate a Personal Information Form...

What do you do?

STEP 16

CPM approves circulation of PIF to explore obtaining a call

Writing and circulating a candidate's Personal Information Form is a step in obtaining a call that involves the CPM. Most theological institutions provide some assistance to their students as the initial draft is prepared. This draft is to be shared with the CPM, for it is the task of the CPM, and not the institution, to approve the PIF.

Blank Personal Information Forms may be obtained from Call Referral Services by calling (502) 569-5225, or printed from PC(USA) web site under the heading of Church Leadership Connection (CLC)

The Call Referral Services will not accept a PIF from anyone without an attestation form from the CPM moderator. As a CPM moderator, you will be provided a pass word to access CLC and give authorization for a candidate to circulate a PIF on line.

When a student requests your assistance in completing the PIF...

What do you do?

- A. Tread a fine line between assisting a candidate to present his or her best side and rewriting the PIF for the candidate.
- B. Help the candidate present his or her skills, gifts, and personality. Here the moderator or CPM liaison must use diplomacy, direction, and encouragement.

Alert

Many CPM moderators may find themselves listed as references on candidates' PIFs. Because of possible litigation and ethical restraints, responses you give as a reference should be limited to those things about which you have firsthand knowledge.

Alert

It is the policy of the Call Referral Services to not circulate PIFs of those candidates who have not been certified ready to seek a call by their CPMs. A critical question is your presbytery's policy authorizing candidates to prepare and circulate PIFs. One extreme is to place no requirements and to allow any senior under care to circulate a PIF. At the other extreme, presbytery may forbid the submission of PIFs to the Call Referral Services until all examinations are passed, all requirements are met, and no barriers remain that would block ordination. Such requirements avoid the problem of candidates entering into negotiation with churches when they cannot reasonably accept an offered call. It is important for you, as moderator of the CPM, to make sure that graduating seniors know the presbytery's policy regarding the circulation of PIFs at the beginning of their senior year. You may wish to send the policy to candidates in writing so that there are no surprises for them or your committee.

Steps 17-18

- Step 17 - Negotiation for service/call.
- Step 18 - Examination and ordination.

You have a candidate who has passed the Standard Ordination Examinations, graduated from an appropriate theological institution (or is close to graduation), participated in a thorough final assessment, and been certified ready to seek a call...

What do you do?

<p>STEP 17</p> <p>Negotiations for service/call</p>

- A. Continue to monitor candidate’s progress in securing a call.
- B. Give leads on where a call may be obtained including the names of personal contact persons and/or executive leadership and how to access the Church Leadership Connection online.
- C. Advise the candidate on how to prepare a Personal Information Form (PIF), secure your attestation as CPM moderator, and submit it online with Church Leadership Connection of the Call Referral Service of the National Ministry Division.

RETRACING OUR STEPS

Having a degree does not constitute readiness for ordination. It is but one requirement for ordination. A candidate may have graduated at the top of his or her class and still not be ready to receive a call. The CPM must look for things that may delay being ready to negotiate a call, such as:

Time requirements: A person must have been under care for a minimum of two years, that time beginning on the date when she or he was enrolled by the presbytery as an inquirer. The person must have been a candidate for at least one year, that time beginning on the date when he or she was enrolled by the presbytery as a candidate.

Process requirements: The person must have progressed properly from church member to inquirer to candidate. The candidate must have had a final assessment by the CPM and that assessment certified by the

presbytery.

Other requirements: (1) Language requirements, fieldwork, etc., must be successfully completed. Denominational requirements are found in the *Book of Order* (G-14.0310). (2) Other requirements of presbytery or your committee that may have applied to the candidate specifically, such as CPE, intern years, etc.

Exemptions: There may be exceptions to some requirements that may be granted by the presbytery, approved by the synod, and reported to the presbytery (G-14.0313b). Any such exemptions must be documented and noted in the committee minutes and in the candidate's file.

Ordination examinations: As noted in Chapter 6 of this Handbook, the five Standard Ordination Examinations must have been successfully completed.

Final assessment: As discussed earlier in Chapter 6 of this Handbook, the CPM must have completed the final assessment and have certified the candidate as ready to be examined for ordination.

When these requirements have been satisfied, the candidate may proceed to negotiate for a call.

Alert

When a married couple is seeking to be ordained and both are at the point of first call in the process, there is an additional reason for celebration and an additional concern. Remember that you are dealing with two individuals and each must be examined, approved, and accepted on his or her own merits. Beware of “joint appearances” before CPM and the presbytery—you are considering two individuals, each of whom must be able to stand alone.

The *Book of Order* (G-14.0314a) now states that it is the responsibility of the presbytery of call to conduct the examination for ordination (sometimes referred to as “trials for ordination”)

STEP 18

Examination and ordination

What do you do?

- A. Meet with the candidate to discuss the purpose and process for conducting the presbytery's examination for ordination.
- B. Assist the candidate to prepare for the examination by posing sample questions to see how he/she handles them and by providing feedback

- on the content and style of the responses.
- C. Consider rehearsing the examination process with the candidate in a sanctuary setting to enable him/her to get a better feel for the reality about to be experienced.
 - D. Provide the candidate with constructive feedback on the style, content, theology, and response to the mock examination experience.

Alert

It is the task of the candidate's presbytery to fully prepare her/him for the examination for ordination on the floor of the presbytery. You need to be sure that candidates from your presbytery are prepared to answer a wide range of questions in a variety of situations. If necessary, coach candidates on ways to handle (and not to handle) questions related to controversial issues/subjects that may be raised during the floor examination.

The *Book of Order* gives guidance (G-14.0314) and experience shows that there is room for latitude in this matter...

- A. Ordinarily it is the presbytery of care that ordains a candidate.
- B. However, the candidate may request his/her presbytery of care to permit the ordination service to take place within the presbytery of call, and that presbytery may grant such permission when requested by the presbytery of care.
- C. A candidate who wishes to be examined and ordained in the presbytery of call may do so upon approval by both presbyteries (care and call).

Alert

In these matters, coordination between presbyteries needs to include not only the moderators of the CPMs but also the stated clerks and often the Committee on Ministry moderators.

Some Important Related Issues for the CPM

You are asked to examine for ordination a candidate under care of another presbytery and who has accepted a call to a congregation in your presbytery...

What do you do?

- A. Read carefully the file received from the presbytery of care before interviewing the candidate.
- B. Examine the policies of your presbytery to see whether the candidate meets all of your requirements.
- C. Establish early open communication with the Committee on Ministry (COM) about the candidate.
- D. Be clear about who will bring the candidate to the floor of presbytery—CPM or COM? The CPM will determine the candidate’s readiness to be examined for ordination unless this responsibility is designated to another appropriate committee. The COM determines suitability for a particular call.

Alert

Negotiating skills and people skills will be required of the COM and the CPM in this process. It is important to follow the “spirit” as well as the “letter” of the law. The two committees must work together when candidates from other presbyteries are being interviewed for positions within your presbytery. One difficulty that may arise is when a Pastor Nominating Committee decides to call a candidate before the CPM has examined the candidate and certified him or her ready for ordination.

A congregation in your presbytery is exerting pressure to proceed with the call and ordination of a candidate they wish to employ. There are questions about requirements of the candidate’s presbytery that differ from those of your presbytery...

What do you do?

To avoid being “boxed in” or pressured to make affirmative decisions when there may be questions about a candidate’s readiness for ordination, consider the following:

- A. Establish in advance policies that deal with a candidate from another presbytery, the COM, and congregations;
- B. Review relationships and key time schedules;
- C. Meet with the candidate concerning his or her readiness for ordination *before* a visit to a congregation is made. Because the COM will also be interviewing the candidate, arrange for representatives of both committees to participate in the meetings. Any questions concerning readiness can be dealt with before prior commitments are made or expectations unduly influencing the process are raised. **Caution:** Policies should be established jointly between CPM and COM and communicated to congregations in order to prevent congregations and candidates from developing unworkable expectations.

A candidate from another presbytery submits a PIP to a congregation in your presbytery...

What do you do?

- A. Review the PIF route in your presbytery. Many presbyteries have policies as part of the candidacy process such as:
 - 1. Attendance at a Presbyterian seminary;
 - 2. Clinical Pastoral Education (CPE);
 - 3. Internships;
 - 4. Special academic requirements.These policies should be communicated to candidates, the COM, congregations, Pastor Nominating Committees (PNCs), and theological institution contact persons.

- B. The following should be worked out with the COM before a candidate appears before the CPM with a call in hand:
 - 1. How will you deal with a candidate from another presbytery who does not meet the requirements of your presbytery?
 - 2. Will the candidate be required to fulfill your presbytery requirements?
 - 3. How will Pastor Nominating Committees be informed of problems before they consider a candidate?
 - 4. How soon will the PNC be notified and by whom?
 - 5. Will the PIF go directly to the PNC or is there another route for PIFs in your presbytery?

Work with the Committee on Ministry

Alert

When a candidate gets to the point of accepting a call, your committee will need to work closely with the COM. The Committee on Ministry will make recommendations to presbytery about the suitability of a candidate for a particular call. It may be tempting to try to do the job of the COM here, but beware.

Several matters concerning procedure should be negotiated with the COM before a candidate's future hangs in the balance:

- A. **If a candidate from your presbytery is seeking a call in your presbytery, what are the steps to be followed?**

- Complete a successful final assessment;
- Give permission to circulate the PIF;
- Initiate conversation with the COM moderator;
- Make contact with the Pastor Nominating Committee through the COM;
- Review with the candidate the process leading to a call;
- Prepare the candidate for examination by presbytery;
- The presbytery examines for ordination;
- Select and present names for the ordination commission of presbytery.

Other questions include:

- When will the COM accept responsibility for the candidate?
- Who will present the candidate for the trials of ordination?
- Who will present the slate for the commission to ordain/install should the examination be sustained?

Alert

If the CPM is presenting a candidate for examination for ordination, and the COM is going to present the same person as a candidate for a position within your presbytery, be sure that the clerk puts the CPM on the docket before the COM. Otherwise the CPM presentation seems a moot point, the decision to ordain and install already having been made.

B. If a candidate under the care of another presbytery is seeking a call in your presbytery, what are the steps to take?

- Conduct an interview with the candidate;
- Determine whether the candidate is ready to be examined for ordination on the floor of the presbytery;
- Make an appropriate recommendation to the COM on whether or not to proceed with examination;
- Also, discuss with COM appropriate issues listed, on page 28, under “Other requirements.”

Alert

The possible complications here are many, and include scheduling interviews and getting approvals in order. Avoid the pitfall of having the COM approve a candidate that the CPM still has not seen. It makes saying “yes” meaningless and saying “no” nearly impossible

C. If a candidate from your presbytery is seeking a call in another presbytery, what must you do?

- Send the candidate's file when requested;
- Be aware that if the candidacy process is not successful the file and the responsibility for the candidate return to your CPM. Such a situation calls for **extraordinary pastoral care**.

The service of ordination is being planned...

What do you do?

- A. Assist the candidate to prepare for the service of ordination. (*Use the Checklist for Ordinations found at the end of this section.*) This is an important task for your committee. Presumably each candidate will only prepare for one such service and has no idea of the problems and/or policies related to it.
- B. Help the candidate understand the policies of the committee and presbytery about:
 1. What time of day may ordinations take place? Some presbyteries avoid the Sunday morning worship time.
 2. What policies determine the constitution of the commission of presbytery? Who may preach? Who may charge the candidate and the congregation? The stated clerk may give help here. As CPM moderator you will need to:
 - Understand the policies;
 - Inform the candidate of the policies;
 - Assist the candidate to prepare the slate for the commission, and ensure that the slate is ready for presentation following the successful completion of the examination for ordination.
- C. Help the candidate be sensitive to inclusiveness issues and persons (home pastor, session liaison, committee liaison) who might feel slighted if not involved. Is there a presbytery policy?
- D. Help the candidate consider the costs that will be incurred if someone from a distance is asked to participate. Such costs include at least travel, lodging, and honorarium.
- E. Is an offering allowed or required? Is there a policy on this? Does the candidate know to what cause the offering will go? How do the funds get from the worship service to the place they need to go? Should an explanation of the offering be printed in the bulletin?
- F. Invitations are often printed and sent. Does your presbytery have them printed, or is this expense borne by the local congregation? What is the tradition in your presbytery?
- G. Who will arrange for and pay for the bulletins—local church, presbytery, or candidate?

H. A commission is ordinarily appointed to ordain the candidate for the presbytery. It is appropriate to discuss the date and time of the service of ordination with the moderator of the presbytery. Whether he or she is available will affect the makeup of the commission. Encourage the candidate to contact the clerk of the presbytery about the presbytery's calendar.

Once the day, time, and place have been determined, and the members of the commission are in place, the candidate should contact the members of the commission to request them to take particular parts of the service, to inform them when and where the commission will meet, who the other members of the commission are, appropriate dress, and so forth. When the day arrives, the moderator of the commission is the person in charge. As CPM moderator, you may wish to prepare a checklist for the moderator of the commission in cooperation with the COM moderator and the stated clerk.

The candidate has been ordained by the appropriate presbytery...

What do you do?

- a. Be sure that your stated clerk completes **Form 7 (Report of Ordination of Candidate)** and mails it to the Office of Resourcing Committees on Preparation for Ministry in Louisville
- b. Help your CPM to celebrate in appropriate ways its role in guiding a person to fulfill the call to serve God as a minister of the Word and Sacrament.

Checklist for Ordinations

A. The presbytery policy is: _____

B. The service of ordination is scheduled for:
Date _____ Time _____ Place _____
Session approval was granted on _____

C. The following commission was elected and approved by the presbytery:
On (date) _____
Moderator _____
Clergy members _____
Elders _____
Other invited participants _____

D. The Order of Worship will be prepared by _____
By this date _____

E. Bulletins will be prepared by _____
By this date _____

F. The following persons will need to be invited _____

CPM RELATIONSHIP TO THE SESSION

Because the preparation for ministry process begins with the session, it is important that the moderator of the CPM affirm the importance and significance of this governing body in every way possible. Seeds of the relationship are planted in the initial contact between the CPM and the session--when an applicant indicates his or her interest in the ministry of the Word and Sacrament.

Sessions need to be aware of the preparation process in its entirety and the presbytery requirements for it before they have a potential applicant for inquiry. Periodic announcements at presbytery meetings or a printed brochure are means to this end. Sessions and congregations need to be aware of the duties and responsibilities of the CPM and the appropriate persons to contact when an applicant appears.

As moderator of the CPM you need to know how your committee conducts session orientations as called for in the *Book of Order* (G-13.0303c). This initial meeting is very important. For some sessions of new congregations and racial ethnic congregations, this may be a teaching moment about the connectional nature of our church and our Reformed tradition in terms of one's call to ministry of the Word and Sacrament.

Orientations may take place at regular meetings of session or at a called meeting. Sufficient time for orientation should be negotiated with the moderator or clerk of session well in advance of the meeting. If this is a first orientation for the session, more time will be needed. Some CPMs train a special subcommittee to do orientations, selecting committee members with communication skills, knowledge of the preparation process, and experience working with people of different cultures. Others share the responsibility among the members. Regardless of the option you choose, plan carefully for this orientation of the session to the preparation process used in your presbytery. Challenge the session members to consider their own call and be sure that they are clear about what is expected of them and time requirements that must be met.

THE SESSION LIAISON is expected to represent the session with the CPM especially at such times as the annual consultation, and will receive transcripts and reports on the inquirer's/candidate's progress and copies of the required forms for the stages of the process. The session liaison will be present

when the inquirer is received and enrolled by presbytery, when the inquirer is enrolled as a candidate, when the candidate is examined for ordination, when a candidate is presented a call, and when the candidate is ordained. These and other duties determined by the CPM or the presbytery should be clearly communicated to the session liaison when the liaison is appointed and the name given to the CPM (see Chapter 2, Step 4).

RECOMMENDED DUTIES OF THE SESSION LIAISON

Background: The *Book of Order* provides for the appointment of an elder (or a group of persons including at least one elder) to act as liaison with the inquirer/candidate and with presbytery's Committee on Preparation for Ministry, and to participate with the inquirer/candidate and presbytery's committee as it explores and evaluates his or her progress in the preparation for ministry (see G-14.0306b). Outlined below are some of the ways in which the session liaison can be of assistance:

- A. Learn the background of your inquirer or candidate if you do not already know it. This includes parents, siblings, school, college, avocational interests and abilities, birthday, name of spouse (if married), name(s) of child(ren) (if any), (proposed) seminary, progress toward ordination, financial needs, and so forth.
- B. Visit, write, or phone to introduce yourself.
- C. Become acquainted in ways that seem natural to you and the inquirer or candidate.
- D. Take an interest in his/her academic studies, field education, annual consultation, and other activities related to preparation for the ministry of the Word and Sacrament.
- E. Make regular reports to session, monthly if possible, on the progress of the inquirer/candidate.
- F. Share with the committee, especially at the time of annual consultation, any areas of particular need of the inquirer/candidate--whether financial or personal.
- G. Become aware of when the inquirer or candidate will be home and try to make some contact, even if it is only a phone call.
- H. Identify ways to keep the congregation aware of the names of its inquirers/candidates (away at seminary or at home) who have entered a covenant relationship with the presbytery and are preparing for ministry of the Word and Sacrament.
- I. Initiate conversation with your session on the possibility of providing financial assistance or other tangible support to your inquirers and candidates.
- J. At the presbytery meeting at which the inquirer or candidate is to be received or examined, speak a word in his/her behalf.

- K. Consider with your session the possibility of assisting in the payment of necessary expenses incurred in relation to annual consultations.
- L. At the presbytery meeting at which the candidate is examined for ordination, make sure someone has been appointed (check with your pastor or the Committee on Preparation for Ministry) to leave the meeting with the candidate and his/her family when presbytery is making its decision.
- M. Be present if at all possible at the ordination and installation.
- N. Remember your inquirer and candidate in prayer.
- O. Write your inquirer or candidate on special occasions (for example, birthdays or anniversaries).
- P. Become acquainted with the *Preparation for Ministry Manual* so that you are aware of requirements and procedures and can provide timely support (for example, appearances before presbytery, Annual Consultation, Presbyteries' Cooperative Examinations, Final Assessment, and so forth).
- Q. Discuss with your session progress the inquirer/candidate is making, as reflected in the Summary Report of Annual Consultation which is prepared by the presbytery Committee on Preparation for Ministry and sent to the sponsoring session.
- R. The role of the spouse of the inquirer or candidate is particularly important. Try to be supportive, sensitive, and understanding of the whole family. Let the committee know if there are ways the committee may better assist the wives/husbands of inquirers and candidates in preparing for their new roles.
- S. In a word, be a friend and lend to your inquirer and candidate a sense of your personal, moral, and spiritual interest in, and support of, him/her in training for the ministry of the Word and Sacrament.
- T. As you perform your tasks, you will also grow in grace and faith.

The committee's work with the session is to assist this governing body to be a true covenanting partner in the preparation process. The CPM moderator plays an important role in determining whether the session is a full partner.

CPM RELATIONSHIP TO THE COMMITTEE ON MINISTRY

As the time for a candidate's ordination nears, the need for clear communication between the CPM and the COM becomes obvious. If this does not happen, the candidate may miss an important step in the process, or feel free to design his or her own procedure. Neither committee should give any advice or take any steps without first communicating with the other. Unilateral actions and/or advice may cause the process to come apart.

Because the Presbyterian system relies to a great extent on volunteers,

clearly defined policies, procedures, and relationships should be available in writing for all committee members. The following suggest the necessity for joint annual planning and training for CPM and COM:

A PNC IS READY TO INTERVIEW A CANDIDATE AND HEAR THE CANDIDATE PREACH IN A NEUTRAL PULPIT

A. QUESTIONS TO CONSIDER

1. How does the CPM find out about pastoral candidates who are also candidates for ordination? If the candidate is enrolled in another presbytery, does the CPM become involved in the process before an invitation to visit is offered? The earlier the CPM obtains information about these candidates for ordination, the smoother the process will be. In any event, the CPM must review the candidate's PIF and check with his or her CPM to determine if the candidate meets your presbytery's requirements.
2. Presbytery should determine a process to coordinate a meeting of the CPM, COM, and the PNC. It is important that the three committees agree on who has responsibility for which issues and how communications can be kept open.
3. CPM and COM must coordinate candidates' appearances at meetings of presbytery. Examination for ordination occurs before examination for membership in presbytery.
4. How is the examination for ordination or membership to be done? Some presbyteries assign the examination to the CPM while others make it a joint responsibility of CPM and COM.
5. After the candidate successfully completes the examination, who presents the ordination/installation plans and the terms of the call? Some presbyteries make these a separate item for the COM report, and some do the examination and ordination plans as a single report.

B. SHARED CONCERNS - Schedule an Annual Meeting of CPM/COM

1. This affords both committees an opportunity to see the total picture of the call and ordination process.
2. Issues of litigation, confidentiality, liability, and propriety are major concerns in the religious community. It is wise to plan time with presbytery legal counsel to examine these issues and develop procedures and policies.
3. Since the denomination defines the meaning of ordination, specialized ministries, and validated ministries, the CPM and COM must know what changes occur and what each other is doing, and must develop joint policies on these matters.

4. Staff relationships and responsibilities can be clarified. A major issue is the degree to which staff is called on to implement policies as well as provide communication and interpretation to and between candidate, CPM, COM, and PNC.

C. UNFORESEEN PROBLEMS

Misunderstandings, communications breakdowns, incorrect assumptions, maverick committee members and/or candidates, overanxious PNCs, as well as other matters, can and will cause crises at some point in your committee's work.

When a crisis occurs...

What do you do?

- A. Remember that all parties are persons of goodwill and are seeking Christ's will through the process.
- B. Know policies and procedures. (Presbyterians prefer to put matters in writing as much as possible--this is a time to be glad of that.) Seek solutions in the *Book of Order*.
- C. Communicate problems to staff and related committees to keep them aware of the procedures you are using.
- D. When the crisis is over, evaluate policies and procedures to determine if they work and what changes need to be made.
- E. Additional considerations:
 1. Make sure each member of the CPM knows the procedures for interfacing with COM and PNC.
 2. Share forms, manuals, policies, and procedures with COM and PNC.
 3. Visit with the COM moderator periodically to review and evaluate CPM/COM issues in the presbytery.

CPM RELATIONSHIP TO PRESBYTERY STAFF

In addition to a presbytery executive, some presbyteries call a staff person whose responsibilities include providing staff services to the Committee on Ministry, the Committee on Preparation for Ministry, and other groups related to vocations. In many cases, however, the Committee on Preparation for Ministry will not have a staff person assigned to it. Because the presbytery executives are generally expected to provide staff services to all of the committees of presbytery, their heavy schedule may mean that they may not be able to attend regularly meetings of the CPM.

Increasingly, presbytery executives called upon to provide references for

candidates seeking their first calls, as well as to provide references and other information regarding any person seeking a new call. It is essential, therefore, that presbytery executives have knowledge of and information about each candidate. As moderator of the CPM you play an important role in initiating and providing necessary information.

Following your election as moderator of the Committee on Preparation for Ministry, it is appropriate for you to meet with the presbytery executive and/or other staff assigned to the CPM, about the work of the committee, your own role, your expectations, the expectations of the staff person, the process for preparation for ministry and the policies related to it in your presbytery, and the manner in which you and the staff will communicate. Generally, the staff person will contact you early in your tenure about your responsibilities, opportunities for training, the CPM process, and the relationship you and the executive or other staff may expect to have.

If for any reason you are not contacted by a staff person or the executive within the first month of your service as moderator of the CPM, it is appropriate for you to contact that staff person related to your committee. Matters that will be particularly helpful to you, the staff person, the committee and to both inquirers and candidates are:

- A. Invite the presbytery executive or other staff assigned to the CPM to attend committee meetings as often as possible. Early in your tenure, arrange for a specific meeting when the staff person can discuss his or her role in providing references for candidates; the relation of the staff person to the moderator of the CPM and to the committee itself; and the policies and procedures of the CPM and their rationale.
- B. See that presbytery executive or other staff person receives a copy of your committee policies and procedures.
- C. Make sure that the staff person is on the mailing list of your committee and that she or he receives all minutes and other significant papers.

In those presbyteries where the presbytery executive is unable to be involved closely with the work of the committee, she or he may be able to provide only minimal information about candidates to an executive, a CPM, or a Pastoral Nominating Committee from another presbytery. In such cases, the executive may request that the person making the inquiry contact the moderator of the CPM or the candidate's CPM liaison for the information. You, as CPM moderator, and the executive in your presbytery may wish to discuss the development of a process for meeting this need.

CPM RELATIONSHIP TO THE STATED CLERK

The stated clerk of your presbytery is someone with whom you should establish a good working relationship. A Committee on Preparation for Ministry is required by the *Book of Order*, and much of what is done by the committee involves presbytery time and resources. You must work with the stated clerk to coordinate your committee's needs with the work of the whole presbytery. Items for consideration include:

- A. Presbytery Rolls. Since the clerk is responsible for the rolls of presbytery, all actions regarding the status of inquirers and candidates should be reported in writing to the clerk.
- B. Docket. Since the clerk is usually involved in preparing the docket for meetings of the presbytery, all requests for time on the docket should be discussed with the clerk as far in advance as possible. Time conflicts are often most difficult in the spring or early summer when graduates of theological institutions are anticipating calls. Time-of-day requirements may also be important. If you have a candidate who can only attend a portion of a meeting, work with the clerk to schedule your report when the candidate can be present. Usually clerks are very understanding about these needs.
- C. Communication. The clerk is the officer of presbytery through whom official communication takes place. All requests for official actions should be addressed to and carried out by the clerk.
- D. Parliamentary Procedure. The clerk usually acts as parliamentarian for the presbytery. Questions about interpretation of parts of the *Book of Order* or how to apply them to the inquirer/candidacy process may be addressed to the clerk.
- E. Meetings. Since your CPM will have many occasions to work with the clerk, it may be wise to invite him or her to your training sessions or to regular meetings to facilitate understanding the process and to help the committee understand the interface with the clerk's office.

Alert

The many steps in the inquirer/candidacy process requires presbytery policies that provide guidance and facilitate the process. If your presbytery does not have such policies in place, work with the officers and staff to establish them. Training sessions provide a good opportunity to work with the clerk to develop policies as needed.

CPM RELATIONSHIP TO THE OFFICE OF RESOURCING COMMITTEES ON PREPARATION FOR MINISTRY

As moderator of the CPM, the office of the General Assembly with which you will work most closely is the Office of Resourcing Committees on Preparation for Ministry of the National Ministries Division. This office is the national “nerve center” for work related to presbytery CPMs. It manages the primary data bank of information related to persons enrolled by presbyteries to prepare for ministry of the Word and Sacrament. Presbytery actions regarding individual inquirers/candidates are recorded on special forms and reported to this office. Staff services of this office will be valuable assistance to you and the work of your committee by providing:

- A. Resources on the preparation process to inquirer/candidates, committees, and other partners in the process;
- B. Consultative assistance in planning and implementing CPM training events;
- C. Counsel regarding specific problems encountered by the CPM as it implements the process;
- D. A variety of statistical data related to inquirers/candidates and CPMs;
- E. The intent and purpose of *Book of Order* references (G- 14.0300) that relate to the preparation for ministry process;
- F. Research and data to determine needs/results of the preparation process of participants.

The office exists to support and assist presbyteries, synods, and theological institutions in their work with inquirers/candidates. Please call the office when you need help. The toll free number is: 1-888-728-7228, X-5771.

CPM RELATIONSHIP TO THEOLOGICAL INSTITUTIONS

All major theological institutions have a contact person listed in “The Directory of Theological Institution Contact Persons.” This directory is in the Orientation Packet sent to each moderator of CPM by the Office of Resourcing Committees on Preparation for Ministry. If there is no contact person listed for a particular institution, contact the academic dean.

- A. What you may expect from the theological institution:
 - 1. Annual reports of grades, field education experience, and other evaluative reports. Normally, these reports will be released (in writing) by the student to be sent on request to the CPM.
 - 2. An “open telephone” policy to enable you to discuss any concern you may have about your inquirers/candidates or the education program of the school.

3. An “open door” policy to enable you to visit the school, and to meet with officials and teachers, the contact person, and your inquirers/candidates. The courtesy of a notification of your visit will be appreciated.
4. An office or persons to assist the student with field education requirements, Standard Ordination Examinations, and placement issues such as preparing the PIF and training for interviews.
5. A response to the CPM’s inquiry by the institution regarding any problem(s) faced by students under your care: financial, cultural, ethical, academic, physical, legal, and so forth.

B. What the institution expects of the CPM:

1. Regular and consistent contact with your inquirers/candidates.
2. Copies of reports of the annual consultations.
3. When possible, tangible concern for the inquirer’s/candidate’s financial needs. Travel costs for annual consultations is the responsibility of presbytery (G-14.0309a), generally arranged through the CPM.
4. Copies of your presbytery’s policies related to additional field work, CPE (Clinical Pastoral Education), or other requirements for completing the process and seeking a call.
5. Opportunities for representatives of theological institutions to participate at their expense with you in CPM training events.
6. Registration of inquirers/candidates for the Standard Ordination Examinations.

CPM RELATIONSHIP TO THE PRESBYTERY NOMINATING COMMITTEE

Nominating committees of presbyteries may or may not welcome communications from other committees as these may be seen as attempts to influence their work. For this reason it is important for the moderator of the Committee on Preparation for Ministry to visit informally with the moderator of the Nominating Committee. It may also be effective to request a brief meeting with the Nominating Committee to explain the unique work done by the CPM and to describe the kinds of skills, experience, and capabilities required of CPM members in order for them to be most helpful to candidates and inquirers related to the presbytery.

A. Encourage the Nominating Committee to consider the following in making nominations to the CPM:

1. Persons who represent
 - a. Clergy/elders (bylaws may determine this);
 - b. Women/men;
 - c. Theological diversity within the Reformed tradition;

- d. Parish/specialized ministries;
 - e. Various ages and racial/ethnic groups.
2. Persons who have time to do CPM work beyond that required for regular meetings of the committee;
 3. Persons who have been recently ordained;
 4. Persons who have expertise in personnel work, pastoral counseling, and so forth;
 5. Former members of CPM and former session liaison;
 6. Parents of candidates who have recently completed the process;
 7. Members (or recent members) of the Committee on Ministry.

B. Persons to be considered as CPM members need to exhibit these qualities:

1. Ability and willingness to listen;
2. Understanding of and willingness to work within the limits of confidentiality;
3. Perception and “openness”;
4. Knowledge of the Presbyterian system and a positive outlook on it;
5. Process skills but without a need to dominate a group;
6. Initiative, dependability, and potential for leadership;
7. Patience, as it takes a year to come up to speed and feel comfortable.

NOTE: If permitted in your presbytery, there may be a need to co-opt persons to secure the requisite skills and experience needed to balance the committee. Such persons may only have a voice on the committee, or they may have a vote, depending on your presbytery policy.

C. Develop a written statement for the Nominating Committee as a reference for their work. Include the following:

1. When and how often the CPM meets;
2. The amount of time required each year for committee work in addition to stated meetings (estimated on the basis of recent experience);
3. An outline of the preparation for ministry process with brief descriptions of what is involved at the various steps;
4. A statement of the importance of continuity in membership;
5. Persons to be recommended to nominations as ordination exam readers.

Explain that because each member of the committee is assigned one or more inquirers/candidates to work with as a CPM advisor, and because continuity of these relationships is essential, it is rarely helpful to have interim pastors on the CPM. Inquirers/candidates find that just the normal changes that occur in rotation of members are difficult enough.

- D. When the time comes to nominate a new moderator of the CPM, get in touch with the Nominating Committee or its moderator. Share with them your experience and impress upon them the need for careful consideration of your successor and members of the CPM.

Alert

Be sure that the Nominating Committee understands fully the significance of the work of the CPM in the present and future lives of inquirers/candidates related to the presbytery.

Appendix I

Maintaining Files

The CPM moderator is responsible for inquirer/candidate files. Such files are to be treated as confidential information by the Committee on Preparation for Ministry. Documents to be included in such files include: official forms, academic transcripts, correspondence, reports from psychologists or counseling services, field work evaluations, ordination examinations, reports of annual consultations, etc. **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 (U.S.A.).**

It is important for the CPM moderator to follow established policies and procedures regarding the use of the files. Such policies should be known to the presbytery executive and/or staff person who works with the committee. Should no such policies or procedures exist, it is important that they be established. Questions to be considered by the committee in setting policies include: Who, specifically, has access to the files? Who has control of the files? Where are files kept? How long are files maintained?

Files should be stored in a secure place that is available only to those who have access to them. Attention should be given to questions such as: Is the storage fireproof? If there are keys to the room, storage cabinet, or drawers, who is authorized to use them and where are they kept? Are there backup files? Where?

When an inquirer or candidate is transferred to another presbytery, his or her file is forwarded to the CPM of that presbytery. Files should be sent by certified mail or by a delivery service that tracks its deliveries (such as United Parcel Service). No other referral of the files or their contents should be made except with the written permission of the inquirer/candidate.

There should be a policy regarding the disposal of files on inquirers/candidates at the conclusion of the process. Options for disposal include: retaining files, perhaps on microfilm; giving the file to the candidate at the conclusion of the process; destroying the file. CPM moderators are urged to consult with legal counsel, usually the person used by the presbytery, to develop a policy regarding the disposition of files.

Appendix II

CPM Planning Calendar for the Year 20 -- , 20 -- , 20 -- , 20--

Meeting Dates of the Committee on Preparation for Ministry

(Including dates for Committee Retreat/Training and /or other special CPM events/meetings)

_____	_____	_____
_____	_____	_____
_____	_____	_____

Special Meetings for Annual Consultation and Final Assessments

_____	_____
_____	_____
_____	_____

Presbytery Meeting Dates/Places

Dates for Standard Ordination Examinations

Beginning with registration for the 2004 Fall Exams, there will be only ONE deadline for each exam sitting.

PC(USA) Deadlines

Committee Deadlines

August 1 –	Deadline for Fall Ordination Exams	_____
December 31	Winter Ordination Exams	_____
December 31	Bible Content Examination	_____
3rd Weekend in February	Date for Winter Ordination Exams	_____

Projected Dates for Synod or Inter-Presbytery CPM Training Events

_____	_____	_____
_____	_____	_____
_____	_____	_____

Dates of Ordination and Installation Services

_____	_____	_____
Name of Individual	Date of Service	Location of Service
_____	_____	_____
Name of Individual	Date of Service	Location of Service
_____	_____	_____
Name of Individual	Date of Service	Location of Service
_____	_____	_____
Name of Individual	Date of Service	Location of Service

Other Important Annual Meetings/Dates

_____ Meeting with Committee on Ministry

_____ Meeting with Presbytery Executive

_____ Meeting with Stated Clerk

_____ Meeting with Theological Institution Representatives

_____ Meeting with Staff from Counseling Services

_____ Meeting with Presbytery/Synod Legal Counsel

_____ Other meetings

_____ Other meetings

Appendix III

Medical Provisions for Inquirers and Candidates

Full time theological students who are enrolled by presbyteries as inquirers and candidates are eligible to participate in the medical provisions of the Benefits Plan of the Presbytery Church (U.S.A.). An application form must be requested from the Board of Pensions, completed, and returned. Information on changes in the Plan can be secured from your Regional Representative, or will be provided annually by the Board of Pensions through the Office of Resourcing Committees on Preparation for Ministry.

1. The CPM moderator should inform students of their eligibility to participate in the Plan's medical provisions. Students may only enroll during the annual open enrollment period, which is August 1 through September 30. Transfer students or persons newly enrolled in seminary for the spring semester may enroll within 30 days of the start of the new semester.
2. Students may enroll for medical benefits as follows:

Dues percentage (2004)		Monthly	Annual
Self only	10.5%	\$251.39	\$3,016.65
Self and spouse	16.2%	387.86	4,654.26
Self and children	16.2%	387.86	4,654.26
Self, spouse, & children	18.5%	442.92	5,315.05

3. Dues, deductibles, and out-of-pocket maximums are based on the medical minimum participation basis which is equal to 65% of the churchwide median salary. For 2004, Churchwide median salary is \$44,200.

	In Network	Out of Network
Member annual medical deductible	\$290.00	\$430.00
Family medical deductible	290.00	430.00
Family medical out-of-pocket maximum	1,150.00	2,300.00

4. The Board encourage the student's sponsoring church, presbytery, and/or employing organization to contribute toward the cost of medical coverage.
5. New members must request application forms from the Board or down load from Penions.org and complete an "Application for Membership" form for all family members enrolling in the Plan.
7. Enrollment procedures:
Student requests application forms from the Board or online @ Pensions.org
Verification of status within the presbytery is obtained.

Seminary verification of full-time student status is obtained.
Student completes Application for Membership
Student mails completed forms with all verifications to the Board of Pensions

Regional Representatives of the Board of Pensions

Synod of South Atlantic and part of Synod of Living Waters (AL, MS)

T. Clark Simmons
1026 Ponce de Leon Ave., NE
Atlanta, GA 30306
800-966-1575
Fax: 404-875-6615

Synod of Mid-Atlantic and part of Synod of Living Water, KY, TN)

Patricia G. Turner
7109 Staples Mill Road, PMB 268
Richmond, VA 23228-4110
888-895-4550
Fax: 804-672-6279

Synods of the Southwest and the Sun

Sandy McLachlan (Interim Representative)
310 South Alexander Ave.
Duncanville, TX 75116
800-773-7752, X-7049
Fax: 972-709-9661

Non-Geographic Korean Presbyteries

Paul Moon
6600 N. Lincoln Ave., Ste.100
Lincolnwood, IL 60712
800-815-9401
Fax: 847-982-9428

Synod of Puerto Rico

Ernest Badillo
2000 Market St., 2nd Floor
Philadelphia, PA 19103
800-773-7752, X-7346
Fax: 215-587-6215

Synods of Northeast and the Trinity

Philip Gehman
2000 Market St., 2nd Floor
Philadelphia, PA 19103
800-773-7752, X-7482
Fax: 215-587-6209

Synods of Covenant, Lakes and Prairies, Lincoln Trails, and Mid- America

Mary (Minner) Serovy
3900 W. Brown Deer Rd., PMB 229
Brown Deer, WI 53209
800-511-0132
Fax: 414-362-0128

Synods of the Rocky Mountains, Alaska/NW, and Pacific

Mark Frey
18645 SW Farmington Rd., PMB 288
Aloha, OR 97007
800-510-3068
Fax: 503-848-0591

Synod of Southern California & Hawaii

Janice Willette
1042 N. Mountain Ave., #B
Box 395
Upland, CA 91786-3631
888-283-0831
Fax: 909-920-9020

Appendix IV

Financial Counseling

Many inquirers and candidates face critical financial issues and needs during their time of enrollment in the preparation for ministry process. Some persons are able to talk openly about their financial situation with their Committee on Preparation for Ministry (CPM), but others are not. A person's willingness to talk about financial needs and concerns with the CPM has much to do with whether a context for such conversations has been set by the committee. Recent studies show that racial ethnic persons tend to have a higher average student debt load than Caucasian students. One thing is sure—the relationship of finances to one's preparation for ministry simply cannot be ignored either by the inquirer/candidate or by the CPM. Also, it should be noted that **all information related to an inquirer's or candidate's financial situation can only be released by the student and must be treated in a confidential manner by the CPM.**

The following resource, used by the Office of Financial Aid for Studies of the National Ministries Division, is intended to assist CPMs in their work with applicants, inquirers, and candidates. It is designed to provide a model budget format for obtaining basic financial information from inquirers and candidates for use by the CPM.

Should more substantial financial information be needed by the committee, the inquirer/candidate can be requested to secure a financial aid transcript from the institution where he or she is enrolled.

It is important for a CPM to discuss internally the committee's approach to issues of financial counseling with persons under its care. The CPM may consider establishing a policy regarding a maximum amount a student may owe. If a student owes more than the maximum amount, the committee may advise the student to work and pay off some of the debt first before continuing with the preparation process. One must realize that not every inquirer or candidate will need counseling. However, for those who need assistance, the committee may want to have a resource person identified on the committee, or from within the presbytery, with expertise in financial planning. Also, a CPM should not hesitate to call the Office of Financial Aid for Studies (502-569-5776) or visit their web site at www.pcusa.org/financialaid, or the Board of Pensions regional representatives (see page 51) for assistance.