

**Presbytery of San Francisco
Committee on Preparation for Ministry**

**CPM
Liaison Handbook**

Revised June 4, 2014

**Presbytery of San Francisco
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Core Values

Many people play key roles in a person's life when they are discerning a call to the ministry of the Word and Sacrament. As a liaison, you play a significant role in the discernment process. The journey may lead to ordination or may lead another vocation. As a key partner in the covenant with the person and the Presbytery, you are called to work within the rules and guidelines of the PC(USA) and the Presbytery of San Francisco under the grace of God's leading.

This discernment process is grounded in the Reformed understanding of the sovereignty of God and the surprising decision of God to entrust discernment to the community of faith. At all times, our commitment is to prayer, seeking God's wisdom, and listening beyond ourselves to what God is doing in the lives of our students and in the those called to be the Church.

Of the many values we hold as a CPM, here are a few critical ones:

We are more Relational than Task Oriented

- We want to know the whole person not just their paperwork.
- We work with each person to develop his or her gifts for ministry and address their individual challenges.
- We commit to regular prayer for and with each person we are assigned to.
- We have the responsibility of overseeing and guiding a student's spiritual and professional development.
- We maintain quarterly contact with our inquirers and candidates.

We are more Resourcing than Regulatory

- We know the values, guidelines, and rules so that we can help inquirers and candidates stay on the right track.
- We point those under our care in the right direction rather than do for them what they can do for themselves.
- We are not gatekeepers but do maintain the values, guidelines, and standards of the PC(USA) and the Presbytery of San Francisco.

We are more Respectful than Adversarial

- We expect our students to be mature adults and mature disciples and they can expect the same from us.
- We recognize that our process is at its best when it involves mutual decision-making and discernment.
- We acknowledge a broad spectrum of theological commitments, experiences, and gifts for ministry that may be quite different from our own.
- We commit to speak the truth in love.

General Expectations and Responsibilities for Liaisons

1. Read and Pray.
 - Pray for the students coming for interviews.
 - Read all the paperwork in advance of the meeting.
 - Pray for the CPM
2. Attend CPM meetings, first Wednesday of every month, 10:00 am - 3:30 pm at First Presbyterian Church in Berkeley.
 - Notify chair and Erika if you can't be there.
3. Serve on a CPM committee
 - Education, Sermon, CPE requirements, Psychological Assessment, session orientation, ORDS examination, seminary site visits, executive team, etc.

Specific Expectations and Responsibilities for Liaisons as it relates to Inquirers/Candidates

A. Mentor, guide, and coach your assigned person in his/her discernment process.

- 1) Pray regularly for and with student. Pray for your wisdom in the discernment process.
- 2) Encourage your student to talk to you about their growth and development in ministry, their particular challenges, and their ongoing discernment of their call.
- 3) Most students appreciate honest feedback as long as trust has been established.
 - a) Be proactive with them, openly discussing their progress and process.
 - b) Help guide them when they are considering advancement to candidacy, planning their academic program, researching their internship, and pursuing their call.
 - c) Continually assess how he/she is doing in the various growth areas of the covenant.
 - d) Seek wisdom of sub-group and CPM committees when questions/challenges arise. Regularly keep sub-group up-to-date on student's progress.

B. Get to know student personally.

- 1) Invite students to join you for coffee or a meal. Send emails throughout the year.
- 2) Ask to be a friend on my space or face book.
- 3) Automatically receive a student's blog or newsletter.

C. Clarify nature of confidentiality with student.

- 1) Confidentiality is held by the CPM and not the individual liaison.
- 2) Liaison will share with sub-group information relevant to the call process.
- 3) Notes and minutes of all meetings are the confidential property of the CPM.
- 4) Review confidentiality policy of the CPM in Appendix 2.
- 5) To ensure that the CPM makes every effort to avoid dual relationships with its students thereby compromising the integrity of the process, it is our policy that when a member of the committee is directly involved in the training of Inquirers or Candidates the following will be applied: If the committee member is a liaison of the student being trained, the student will be given the opportunity to change liaisons and offered an explanation for the value of doing so. Also, the committee member shall recuse himself or herself from any vote or discussion regarding that student except to give a report on the student's success in the training itself.
- 6) The only exception to the above policy is when a student's records are sequestered by a Judicial Commission.

D. Secure required advanced approvals on behalf of each student.

- 1) Have student follow the guidelines listed in Appendix 8.06.
- 2) Consult appropriate CPM committees for advice, approvals, and waivers.
- 3) Use the consent docket to secure approvals.

- 4) Be sure to communicate these decisions to the student with a copy to presbytery staff.

E. Accompany student to Presbytery.

- 1) At the candidacy interview and, when applicable, to the Examination for Ordination.
- 2) Your job will include introducing them to the gathered assembly and asking the first interview question.
- 3) Serve as a reference to other Presbyteries when the candidate is interviewing.

F. Contact student quarterly.

- 1) Touch base at key points in the year (birthday, holidays, start of semester, finals, ORDS exams, etc).
- 2) Touch base before key CPM milestones.
 - a) 3-4 months out
 - (a) Discuss the appropriateness of student moving to the next level. This is particularly critical when inquires wish to move to candidacy.
 - (b) Confirm CPM interview with student and Erika.
 - (c) Confirm CPM interview on a seminary delegation (annuals only).
 - b) 5-6 weeks out
 - (a) Review the paperwork requirements.
 - (i) Specific forms
 - (ii) Length of answers for the various questions
 - (iii) Timely submission of paperwork 1 month in advance
 - (b) Review who needs to be at the meeting.
 - (i) Elder and pastor advocates required for inquiry, candidacy and final assessment.
 - (ii) Elder and pastor advocates recommended but not required for annuals.
 - (c) Begin discussion about potential items for Growth Objectives (Covenant).
 - (d) Discuss any outstanding requirements such as internships, CPE, ORDS exams, education plans, etc. Remind them of the information required for advanced approvals.
 - (e) Review their file with them.
 - (i) Updated contact information
 - (ii) Transcripts
 - (iii) Education requirements
 - (iv) Certifications (Sexual Misconduct Prevention and "Getting into Shape Fiscally")
 - (v) Self and supervisory evaluations for CPE, internships and work in the church
 - (vi) Advanced approvals
 - (vii) For final, have the education committee sign off on the educational requirements.
 - c) 2-3 weeks out
 - (a) Call references - gather background information for the interview.
 - (b) Contact seminary staff – check in on their progress and how they are doing academically, spiritually, socially, and emotionally.
 - (c) Contact internship and or CPE supervisor if applicable.
 - d) 1-2 nights before interview with CPM or Presbytery
 - (a) Review the particular process/agenda for the CPM or Presbytery meeting with the student to alleviate their anxiety and to give them a clear idea of what to expect.
 - (b) If there is something problematic with the paperwork or you anticipate a difficult conversation with the CPM sub-group, by all means, discuss this with the student and let them know what to expect.

G. Post CPM Interviews

- 1) Check in with the student about the CPM process. Get feedback on what went well and how we might improve our process.
- 2) Immediately following the interview, write up the covenant and send it to the student for signature.

- 3) Submit all the signed paperwork (including the covenant) to the Presbytery office.
- 4) Keep a parallel file of all paperwork on the student.

Appendices

Inquirer Interview Guidelines	pages 6-8
Candidate Interview Guidelines	pages 9-12
Presbytery Script for Motion to Enroll as Candidate	page 13
Final Assessment Interview Guidelines	pages 14-17
Annual Interview Guidelines	pages 19-20
CPM Check List	page 21
Guidelines for CPM Approvals (Appendix 3)	page 22
Credit for Previous Church Work in Partial Fulfillment of the Internship Requirement (STEPS, Appendix 4)	page 23
CPM Form D – Education Check List (STEPS, Appendix 5)	page 24
CPM Form E – Covenant Agreement (STEPS, Appendix 12)	page 25
Seminary Contacts	page 26
Certification of Completion of Education Requirements	page 27

Inquirer Interview Guidelines

Purpose:

To assess the applicant's motives, seriousness of intent, and general suitability for the ministry of the Word and Sacrament

Required Forms:

- Directly from the Student
 - Form 1A – *Application to be Enrolled by Presbytery as an Inquirer*
 - Form 1B – *Session Evaluation and Recommendation*
 - Form 1C – *Estimated Financial Planning for Theological Education*
 - CPM Form A – *Psychological Assessment Release Form*
 - CPM Form B – *Sexual Misconduct Self-Certification*
 - CPM Form C – *Receipt and Adherence to “Standards of Ethical Conduct” and the “Sexual Misconduct Prevention Policy and Procedures of the Presbytery of San Francisco”*
 - CPM Form D – *Education Check List*
 - CPM Form E – *Criminal Background Check Form*
- On File with Presbytery (confirmed by liaison)
 - CPM Form A – *Psychological Assessment Release Form*
 - CPM Form B – *Sexual Misconduct Self-Certification*
 - CPM Form C – *Receipt and Adherence to “Standards of Ethical Conduct” and the “Sexual Misconduct Prevention Policy and Procedures of the Presbytery of San Francisco”*
- Provided by the Presbytery office
 - Transcripts including official transcript indicating conferral of baccalaureate degree
 - Psychological Assessment
 - Self and supervisory evaluations from any internships, CPE, or employment in the church
- Provided by the session
 - Form 1B – *Session Evaluation and Recommendation*

Interview Logistics:

Time: 120 minutes

Moderator: Runs the meeting

Liaison: Brings a vial of oil for the student, develops ideas for covenant during interview

Ritual Keeper: Ensures room is prepared with candles and matches

Recorder: Captures on CPM laptop:

1. All talking points of the discussion
2. Covenant Agreement
3. Motion to approve or not approve applicant as inquirer, effective date

Interview Guidelines:

10 Subgroup Meets to Review Applicant

- Review paperwork
- Review Psychological Assessment
- Review transcripts for undergrad and graduate classes
- Review financial worksheet
- Review information from references
- Review results of Criminal Background Check
- Discuss and assign questions/topics/concerns to be raised

5 Welcome Applicant and Advocates

- Members stand and welcome the applicant and advocates as they enter the room
- Moderator invites them to sit and introduce themselves (name, title, church)

- Applicant introduces him/herself and his/her elder and pastor advocates
 - Moderator opens with prayer
 - Moderator reviews the expectations and schedule for the meeting. Help applicant relax!
- 10 **Applicant Self-Introduction and Discussion on Background Information**
- Applicant introduces self, providing a brief summary of life situation and background using their submitted forms
 - Discuss other background paperwork
- 10 **Psychological Assessment**
- Discuss questions/topics/concerns and suggest potential goals/remedies for issues raised
 - Discuss personal background (family, interests, hobbies, balance, etc)
- 5 **Educational Plan & Finances**
- Discuss applicant's educational background and any issues related to choice of seminary
 - If non-Presbyterian seminary has been chosen, review potential challenges to meeting the CPM educational requirements (Presbyterian classes, reformed theology, etc)
 - Discuss the anticipated budget and debt to be incurred during process
- 5 **Discuss Goals for the Ordination Process**
- Discernment of call – some may be called to other vocations
 - Suitability for ministry
 - Partnership with session, seminary, individual, and CPM
- 10 **Review CPM Requirements**
- STEPS Paper – individual's responsibility to fulfill requirements not the CPM's
 - Education Requirements (Steps page 28, 6.08)
 - ~ MDiv
 - ~ CPM additional educational requirements - CPM Form D – Education Check List
 - ~ Have transcripts sent automatically
 - Experiential Requirements (Steps page 29, 6.09)
 - ~ CPE and Internship - 1 unit of accredited CPE program– 400 hours minimum in each and another 400 hours in one or the other
 - ~ Internship is expected to be a different environment than the student's home church
 - Comprehensive Exams (Steps page 31, 6.10)
 - ~ Bible Content Exam ordinarily taken in first year of seminary
 - ~ 4 Additional Standard Ordination Exams
 - Certifications (Steps page 32, 6.11)
 - ~ Sexual Misconduct Prevention Seminar
 - ~ PC(USA)'s Board of Pension seminar – “Getting into Shape Fiscally”
 - Advanced Approvals (distribute Guidelines for CPM Approvals) (Steps page 32, 6.12)
 - ~ Approval to work in a church
 - ~ All experiential requirements (CPE and Internship)
 - ~ ORDS – retaking and remedial plans
 - ~ Approval to circulate PIF
 - ~ Education waivers
 - Annual Consultations, to candidacy, final assessment (scheduling with Session and CPM)
 - Financial Reimbursement
 - ~ 1/3 travel costs for each annual
 - ~ limited financial help available – max is \$1,250
- 5 **Applicant Asks Questions of the CPM**
- Applicant asks questions about the process, expectations, waivers, discernment of call, etc

5 Elder and Pastor Advocates Report

- Applicant is excused
- Both elder and pastor speak on behalf of the applicant, address any challenges, and answer questions about the applicant from CPM members
- Elder and pastor are excused

10 Sub Group Deliberation and Development of Covenant

- Motion seconded and (*approved/not approved*) that (*name*) be advanced to inquirer effective (*today's date*).
- Determine major elements of the covenant agreement. Be sure to include any issues raised in the Psychological Assessment
 1. Education for Ministry
specific classes, seminary choice, etc
 2. Spiritual Development
Individual and communal spiritual disciplines, worship, prayer, bible study, spiritual direction, service/mission, tithing, etc
 3. Interpersonal Relations
family members, friends, co-workers, small groups, etc
 4. Personal Growth
addiction, conflict avoidance, anger issues, counseling, assertiveness, etc
 5. Professional Development
Book of Confessions, Bible Content, Internship, CPE, mentorship, leadership, etc

3 Review Covenant and Process with Person

- Applicant and advocates return
- If voted to advance to inquirer, all clap as inquirer returns to the room
- Moderator or liaison reviews bullet points for covenant and explains that liaison will send final covenant to Inquirer for signature and return to liaison

10 Overview of the Process to Become a Candidate (Steps page 13, 3.01, 3.02)

Liaison will assist with the following:

- All requirements for the inquiry phase will be completed.
- With the pastor and individual, discern the appropriate time to move to Candidacy. When so discerned:
 - meet with the session
 - provide them with all the appropriate paperwork for consideration to be endorsed as a candidate. If they move to endorse, then:
 - fill out Form 5B and return to the CPM.
 - schedule the interview to advance to Candidate.
- Expectations of the CPM
 - ~ Work on fulfilling covenant agreement.
 - ~ Check-in with liaison quarterly for prayer, discernment discussion.
 - ~ Secure appropriate advanced approvals and follow STEPS paper.
 - ~ Maintain a duplicate copies of all paperwork.
 - ~ Maintain an active relationship with God and be actively involved in the Church.
 - ~ Annuals with CPM are required.
- Theological Reflection – for reflection by end of inquirer process (Form 5A)
 - ~ Sense of motivation for seeking ordination as a Teaching Elder
 - ~ Statement of Faith (one single spaced page)
 - ~ Statement of understanding of the tasks of Teaching Elders

2 Final Prayer/Ritual

- A circle is formed and the liaison offers a prayer of blessing
- Student is presented with a vial of oil

Candidate Interview Guidelines

Purpose:

To assess the inquirer's qualifications, experience and theological maturity in relation to the call to the ministry of Word and Sacrament. Endorsement to candidacy moves the individual from exploration of a call to the affirmation of call by the local church, seminary and the Presbytery.

Required Forms:

- Directly from the Student
 - Form 3 – *Annual Consultation Form*
 - Form 5A – Application to be Enrolled by Presbytery as a Candidate
 - CPM Form D – *Education Check List*
 - Summary of their faith journey leading to a call and their church experience (one page)
- Provided by the Presbytery office
 - “Book of Life” (all previous relevant minutes).
 - Updated transcript.
 - Self and supervisory evaluations from any internships, CPE, or employment in the church
- Provided by the Session
 - Form 5B – *Session Evaluation and Recommendation*

Interview Logistics:

Time: 115 minutes

Moderator: Runs the meeting

Liaison: Develops ideas for covenant during interview, chooses a stole to present to the Candidate

Ritual Keeper: Ensures room is prepared with candles and matches

Recorder: Captures on CPM Laptop:

1. All talking points of the discussion
2. Covenant Agreement
3. Motion to approve or not approve recommendation to candidacy

Interview Guidelines:

10 Subgroup Meets to Review Inquirer

- Review paperwork including any approvals
- Review transcripts for graduate classes
- Review information from references
- Review of 3 Statements from 5A including Statement of Faith
- Discuss and assign questions/topics/concerns and scenarios to be raised

5 Welcome Inquirer and Advocates

- Members stand as inquirer and advocates enter the room and welcome them
- Moderator invites them to sit and introduce themselves (name, title, church)
- Inquirer introduces him/herself and advocates
- Moderator conducts the opening ritual
- Moderator reviews the expectations and schedule for the meeting. Help the inquirer relax!

5 Inquirer Self-Update

- Inquirer provides a brief summary of life situation (family, work, school) since he or she last met with the CPM noting any particular highlights or challenges

- 10 **Statement of Faith**
- Topics to be covered: God, humanity, sin, the Church, sacraments, the mission and ministry of the Church, and eschatology
 - The inquirer should demonstrate Reformed theological reflection that models mature integration of Scripture and the Book of Confessions with SOF
 - One or two of the questions or discussion topics should address a sample pastoral scenario where theological reflection would need to be applied
 - Offer suggestions for further study, theological clarity, and writing style
- 15 **Other Statements from Form 5A**
- Assess the emerging Reformed theological perspective particularly as it relates to Scripture and the Book of Confessions
 - One or two of the questions or discussion topics should address a sample pastoral scenario where theological reflection would need to be applied
- 10 **Progress on Growth Objectives (covenant)**
- Review each growth objective and discuss outcomes and progress
 - Discuss possibilities for new growth objectives
- 5 **Review of Completed, In-Progress and Outstanding Requirements**
- Discuss status on educational requirements
 - Discuss status and any evaluations for experiential requirements (internship and CPE)
 - Discuss status and any remedial action towards completion of Bible Content or ORDS
 - Discuss status on completing certifications (sexual misconduct prevention and fiscal fitness)
 - Financial needs – remind the student of the available scholarship monies of up to \$1,250 maximum
- 5 **Inquirer Asks Questions of the CPM**
- Discuss any concerns or questions
- 10 **Required Questions**
- The inquirer and the CPM will identify any departures, issues, or questions related to the Reformed faith, PC(USA) polity, and affirmation of the questions for candidacy or ordination.
 - Any departures, issues, or questions will be noted in the internal confidential minutes of the CPM and not placed in any motion to the Presbytery for advancement to candidacy.
- 2 **Questions for Candidacy** – will be asked at the Presbytery meeting if advanced
1. Do you believe yourself to be called by God to the ministry of the Word and Sacrament?
 2. Do you promise in reliance upon the grace of God to maintain a Christian character and conduct, and to be diligent and faithful in making full preparation for this ministry?
 3. Do you accept the proper supervision of the presbytery in matters that concern your preparation for this ministry?
 4. Do you desire now to be received by this Presbytery as a candidate for the ministry of the Word and Sacrament in the Presbyterian Church (USA)?
- 3 **Ordination Vows** – will be asked again at the final assessment & at ordination
1. Do you trust in Jesus Christ your Savior, acknowledge him Lord of all and Head of the church, and through him believe in one God, Father, Son and Holy Spirit?
 2. Do you accept the Scriptures of the Old and New Testaments to be, by the Holy Spirit, the unique and authoritative witness to Jesus Christ in the church universal, and God's Word to you?
 3. Do you sincerely receive and adopt the essential tenets of the Reformed faith as

expressed in the confessions of our church as authentic and reliable expositions of what Scripture leads us to believe and do, and will you be instructed and led by those confessions as you lead the people of God?

4. Will you be a minister of the Word and Sacrament in obedience to Jesus Christ, under the authority of Scripture, and continually guided by our confessions?
5. Will you be governed by our church's polity, and will you abide by its discipline? Will you be a friend among your colleagues in ministry, working with them, subject to the ordering of God's Word and Spirit?
6. Will you in your own life seek to follow the Lord Jesus Christ, love your neighbors, and work for the reconciliation of the world?
7. Do you promise to further the peace, unity, and purity of the church?
8. Will you seek to serve the people with energy, intelligence, imagination, and love?
9. Will you be a faithful minister, proclaiming the good news in Word and Sacrament, teaching faith, and caring for people? Will you be active in government and discipline, serving in the governing bodies of the church; and in your ministry will you try to show the love and justice of Jesus Christ?

5 **Elder and Pastor Advocates Report**

- Inquirer is excused
- Both Elder and Pastor speak on behalf of the inquirer, address any challenges, and answer questions about the inquirer from CPM members
- Elder and Pastor are excused

10 **Sub Group Deliberation and Development of Covenant**

- Motion seconded and (*approved/not approved*) to recommend that (*name*) be advanced to candidacy effective (today's date), pending Presbytery approval at the next Presbytery meeting, (*next presbytery's date*).
- Capture any departures in the CPM minutes
- Determine major elements of the covenant agreement
 1. Education for Ministry
specific classes, completion of MDiv, etc
 2. Spiritual Development
Individual and communal spiritual disciplines, worship, prayer, bible study, spiritual direction, service/mission, tithing, etc
 3. Interpersonal Relations
family members, friends, co-workers, small groups, etc
 4. Personal Growth
addiction, conflict avoidance, anger issues, counseling, assertiveness, etc
 5. Professional Development
Further development of Statement of Faith, deeper exploration of Ordination questions, permission to circulate PIF, completion of all the outstanding requirements, mentorship, leadership, etc

5 **Review Covenant and Process with Inquirer**

- Inquirer and advocates return
- If voted to recommend to candidacy, all clap when inquirer returns to the room and the liaison presents the new candidate with a stole.
- Moderator or liaison reviews bullet points for covenant and explains that liaison will send final covenant to Inquirer for signature and return to liaison
- Reviews procedures of coming before Presbytery
 - ~ Present oral version of MEW, condensed to 3 minutes maximum
 - ~ He/She does NOT read their Statement of Faith. This is not a theological examination

- ~ Will be asked questions about their motivation for seeking ministry, their work in the church and their experience of Christian faith. Liaison asks the first question
- ~ Moderator will ask the Questions for Candidacy

5 Overview of Candidacy Phase

- Affirmation of call by all the covenant partners (church, supervisors, seminary and CPM)
- Expectations of the CPM
 - ~ Work on fulfilling covenant agreement
 - ~ Check-in with liaison quarterly for prayer and discernment discussion
 - ~ Complete all the requirements including meeting our education requirements
 - ~ Secure appropriate advance approvals and follows STEPS paper
 - ~ Maintain duplicate copies of all paperwork
 - ~ Maintain active relationship with God and is actively involved in the Church
- Theological Reflection – end of Candidacy for final assessment
 - ~ Demonstrate theological maturity and competence in fields of Reformed theology, bible, polity, worship and sacraments, expressing views compatible with the confessional documents of the Church
 - ~ Present competence in exegesis and sermon development as it relates to contemporary need or context
 - ~ Reveal commitment to the ministry of the Word and Sacrament within the discipline of the PC(USA) with personal maturity, spiritual depth, and a capacity to respond to the needs of others, including colleagues in ministry
 - ~ Express understanding of the meaning of the questions required for ordination informed by knowledge of the church in diverse settings

2 Final Prayer

- A circle is formed and the liaison offers a prayer of blessing

Presbytery Script for Motion to Enroll as Candidate Report of the CPM

1. Introductions:
 - a. CPM Chair: *“I would like to introduce you to the (liaison), who will be presenting our Inquirer.”*
 - b. CPM Liaison *“I would like to introduce you to (student) from (Church).”* Liaison gives a brief introduction of the Inquirer, highlighting experience and top character or ministry skills. *Liaison* then goes to sit in the front row.
2. Student presents a 1-2 minute overview of Motive for seeking Ministry, Experience of Faith, Previous/Current Work in the Church
3. Moderator instructs the group that current CPM policy limits appropriate questions to the following:
 - **M**otives for seeking the ministry
 - **E**xperience of Faith (Christian Faith)
 - **W**ork experience in the Church (forms of ministry undertaken)
4. Moderator will moderate the Question and Answer period. States that the first question comes from CPM and encourages the body to be ready with more.
5. Liaison asks student the first question (prearranged ahead of time with the Inquirer)
6. When a motion is made from the floor to arrest the interview, the Moderator handles the vote. Liaison and student are excused.
7. CPM Chair then makes the following motion:
“The CPM moves and seconds that student be accepted as a Candidate for the Ministry of Word and Sacrament, effective (date of CPM meeting).”
8. The Moderator then asks for discussion on the motion and explains that this should be a full discussion of the vote so positive and negative comments may be included here too. The Moderator makes clear that when the Candidate returns, 1 or 2 persons may share affirmations.
9. The Moderator calls for the vote.
 - a. The Candidate and Liaison are invited back into the Sanctuary and the assembly claps. The moderator offers ‘congratulations!’ and asks the Candidate and Liaison to be seated in the front row. The Moderator invites people to share an affirmation (Ordinarily 1 or 2 people will be invited to speak and each speaker is asked to speak for one minute.)
10. When all comments have been shared, the Moderator invites student and liaison to come to the front of the chancel, including liaisons, friends and family – i.e. all those who have been involved in the Candidate’s formation.
11. The Moderator asks the questions for Candidacy and the Candidates responds to each by saying “I do”.
12. CPM Chair asks the new candidate to kneel and anoints the candidate with oil while saying, “Because you belong to Christ, you belong to us and we belong to you.”
13. The Moderator or designee offers a charge to the Candidate.

Final Assessment Interview Guidelines

Purpose:

To assess the candidate's qualifications, experience, theological maturity, emotional/social maturity, so as to certify him/her "ready for examination, pending a call."

Required Forms:

- From the Student
 - Form 3 – *Annual Consultation Form*
 - CPM Form D – *Education Check List*.
 - Statement of Faith – revised.
 - Sermon (see Appendix 6 in the Steps Paper)
- On File with Presbytery (confirmed by liaison)
 - Ords Exams
 - Psychological Assessment
 - Certificate of completion for Sexual Misconduct Prevention
 - Certificate of completion for "Getting into Shape Fiscally"
- Provided by the Presbytery office
 - "Book of Life"
 - Updated/final transcripts
 - All self and supervisory evaluations for any internships, CPE, and work in the church
- Post Interview Paperwork
 - Form 6 – *Summary Report of Final Assessment of Candidate's Readiness to be Examined for Ordination* (PCUSA Form)

Interview Logistics:

Time: 120 minutes

Moderator: Runs the meeting

Ritual Keeper: Ensures room is prepared with candles, matches, baptismal bowl/pitcher with water

Liaison: Develops ideas for covenant during interview, votive candle to present to finalist

Recorder: Captures on CPM Laptop:

1. All talking points of the discussion
2. Covenant Agreement
3. Motion whether or not to certify "ready for examination, pending a call" including any identified departures

Interview Guidelines:

10 Subgroup Meets for Initial Review/Assessment of Candidate

- Review paperwork and confirm that file is complete and all requirements have been met
- Review transcripts for graduate classes
- Review Sermon
- Review Statement of Faith
- Review information from references
- Discuss and assign questions/topics/concerns/scenarios to be raised

5 Welcome Candidate and Advocates

- Members stand and welcome the candidate and advocates as they enter the room
- Moderator invites them to sit and introduce themselves (name, title, church)
- Candidate introduces him/herself and advocates
- Moderator opens with the ritual
- Moderator reviews the expectations and schedule for the meeting. Help the person relax!

5 Candidate Self-Update

Candidate provides a brief summary of life situation (family, work, school) since he or she last

met with the CPM noting any particular highlights or challenges

25 **Sermon**

- Candidate reads scripture and delivers sermon (15 minute max)
- Discuss of sermon delivery including constructive comments on effectiveness
- Subgroup may discuss exegesis and application of text to context
- Note any inadequacies or impediments for successful completion of this requirement

15 **Statement of Faith**

The candidate should demonstrate Reformed theological reflection that models mature integration of Scripture and the Book of Confessions with the Statement of Faith

- Topics to be covered: God, humanity, sin, the Church, sacraments, the mission and ministry of the Church, and eschatology. Any departure from Reformed faith should be noted for further discussion and discernment by candidate and committee members.
- Discuss the understanding, interpretation, use, and authority of Scripture
- Discuss the place and use of the confessional documents in the life of PC(USA)
- Discuss essential tenets of the Reformed tradition
- Explore the pastoral implications of the Statement of Faith in at least three scenarios, e.g. baptism, pluralism, suffering
- Offer constructive suggestions for further study, theological clarity, and writing style

10 **Progress on Growth Objectives (covenant)**

- Review each growth objective (list them) and discuss outcomes and progress
- Discuss possibilities for new growth objectives

5 **Candidate Asks Questions of the CPM**

- Discuss any concerns including finances and status of a pending call

10 **Required Questions**

- Discuss the candidate's readiness and willingness to commit to ordination to the Ministry of the Word and Sacrament and to live under the discipline of the PC(USA).
- The candidate and the CPM will identify any departures, issues, or questions related to the Reformed faith, PC(USA) polity, and affirmation of the ordination vows.
- It is up to the committee to decide if the identified departure is a "serious departure" from the "essentials of the Reformed faith and polity."
- Any departures, issues, or questions will be noted in the internal confidential minutes of the CPM. Should the candidate be certified "ready for examination, pending a call" with a departure, the departure will be placed in the motion to the Presbytery.

3 **Ordination Vows - asked again at ordination**

1. Do you trust in Jesus Christ your Savior, acknowledge him Lord of all and Head of the church, and through him believe in one God, Father, Son and Holy Spirit?
2. Do you accept the Scriptures of the Old and New Testaments to be, by the Holy Spirit, the unique and authoritative witness to Jesus Christ in the church universal, and God's Word to you?
3. Do you sincerely receive and adopt the essential tenets of the Reformed faith as expressed in the confessions of our church as authentic and reliable expositions of what Scripture leads us to believe and do, and will you be instructed and led by those confessions as you lead the people of God?
4. Will you be a minister of the Word and Sacrament in obedience to Jesus Christ, under the authority of Scripture, and continually guided by our confessions?
5. Will you be governed by our church's polity, and will you abide by its discipline? Will you be a friend among your colleagues in ministry, working with them, subject to the ordering

of God's Word and Spirit?

6. Will you in your own life seek to follow the Lord Jesus Christ, love your neighbors, and work for the reconciliation of the world?
7. Do you promise to further the peace, unity, and purity of the church?
8. Will you seek to serve the people with energy, intelligence, imagination, and love?
9. Will you be a faithful minister, proclaiming the good news in Word and Sacrament, teaching faith, and caring for people? Will you be active in government and discipline, serving in the governing bodies of the church; and in your ministry will you try to show the love and justice of Jesus Christ?

7 Elder and Pastor Advocates Report

- Candidate is excused
- Both Elder and Pastor speak on behalf of the candidate, address any challenges, and answer questions about the candidate from CPM members.
- Elder and Pastor are excused

10 Sub Group Deliberation and Development of Covenant

- Deliberate and vote on one of the following motions:
 1. Move that (*name*) be found certified ready for examination effective (*today's date*) pending Presbytery approval.
 2. Move that (*name*) be found certified ready for examination effective (*today's date*) with the following departure (*list the departure*) pending Presbytery approval.
 3. Move that (*name*) continue as a candidate under care of the Presbytery of San Francisco while all parties continue discernment of call. The candidate may be advised that additional work may be needed before the COM can certify the candidate ready for examination. The outstanding issues should be addressed in the covenant.
 4. Move that (*name*) be removed from the ordination process effective (*date of next Presbytery meeting*).
- Determine major elements of the covenant agreement.
 1. Education for Ministry
Completion of MDIV with final transcript to Presbytery, ongoing educational goals, e.g. directed reading
 2. Spiritual Development
Individual and communal spiritual disciplines, worship, prayer, bible study, spiritual direction, service/mission, tithing, etc
 3. Interpersonal Relations
family members, friends, co-workers, small groups, etc
 4. Personal Growth
addiction, conflict avoidance, anger issues, counseling, assertiveness, etc
 5. Professional Development
Plans for seeking a call, additional professional training, e.g. interim training

5 Review Covenant and Process with Candidate

- Candidate and advocates return.
- If voted "found certified ready for examination," all clap when candidate returns to the room.
- Finalist is presented with a votive candle and a "remembering your baptism" ritual is done.
- Moderator or liaison reviews bullet points for covenant and explains that liaison will send final covenant to candidate for signature and return to Presbytery office

5 Overview of Next Steps

- *Examination* usually happens in Presbytery of Call
- *Ordination* generally happens in the Presbytery of Call
- *Installation* happens in Presbytery of Call.
- If call is not received within the year, an annual will be required. If call is not received within

3 years, annual must be done with entire sub-group to determine if candidate should remain in process

- If the Finalist has been extended a call, the student's covenant relationship is turned over to the Committee on Ministry (COM) in the Presbytery of Call.

5 **Final Prayer**

- A circle is formed and the liaison offers a prayer of blessing

Annual Consultation Interview Guidelines

Purpose:

Required by the Book of Order, these annual consultations allow for ongoing assessment and discernment. These are the only interviews where the elder and pastor advocates are encouraged but not required to attend. Often these interviews happen on seminary site visits or by special arrangement with the CPM liaison. Annuals require at least 3 members of the CPM to be present.

Post-Finalists: Every three years, post-finalists must have a full review by their CPM sub-group and may be accompanied by elder and pastor advocates.

Required Forms:

- From the Individual
 - Form 3 – Annual Consultation Form
 - CPM Form D – Education Check List
- From the Presbytery office
 - “Book of Life”
 - Updated Transcripts
 - All supervisor and self-evaluations from any internships, CPE, and work in the church

Interview Logistics:

Time: 60 minutes

Moderator: Runs the meeting

Ritual Keeper: Ensures room is prepared with candles and matches

Liaison: Develops ideas for covenant during interview, presents a stone

Recorder: Captures on CPM Laptop:

1. All talking points of the discussion
2. Covenant Agreement
3. Motion whether or not to continue person in process as inquirer, candidate or post-finalist

Interview Guidelines:

10 Subgroup Meets to Review/Assess Inquirer/Candidate

- Review paperwork
- Review transcripts for graduate classes
- Review information from references
- Discuss and assign questions/topics/concerns/scenarios to be raised

5 Welcome to Inquirer/Candidate and Advocates

- Members stand and welcome inquirer/candidate and advocates as they enter the room
- Moderator invites them to sit and introduce themselves (name, title, church)
- Inquirer/Candidate introduces him/herself and advocates
- Moderator opens with Opening Ritual
- Moderator reviews the expectations and schedule for the meeting. Help the person relax!

5 Inquirer/Candidate Self-Update

Inquirer/Candidate provides a brief summary of life situation (family, work, school) since he or she last met with the CPM noting any particular highlights or challenges

10 Progress on Growth Objectives (covenant)

- Review each growth objective and discuss outcomes and progress
- Discuss possibilities for new growth objectives

10 Review of Completed, In-Progress and Outstanding Requirements

- Discuss status on educational requirements

- Discuss status and any evaluations for experiential requirements (Internship and CPE)
- Discuss status and any remedial action towards completion of Comprehensive Exams (Bible Content and Standard Ordination Exams)
- Discuss status on completing certifications (sexual misconduct prevention and fiscal fitness)
- Discuss status on circulating PIF (if Candidate's ordination exams have been passed)

5 **Inquirer/Candidate Asks Questions of the CPM**

- Inquirer/Candidate asks questions about the process, expectations, waivers, discernment of call, etc

5 **Elder and Pastor Advocates Report**

- Inquirer/Candidate is excused
- Both Elder and Pastor (if present) speak on behalf of the inquirer/candidate addressing any challenges, and answering questions about the applicant from CPM members.
- Elder and Pastor are excused

5 **Sub Group Deliberation and Development of Covenant**

- Motion seconded and (*approved/not approved*) that (*name*) be continued in the process and retain status as inquirer/candidate effective (*today's date*).
- Determine major elements of the covenant agreement. Be sure to include any issues raised in the Psychological Assessment.
 1. Education for Ministry
specific classes, directed reading etc
 2. Spiritual Development
Individual and communal spiritual disciplines, worship, prayer, bible study, spiritual direction, service/mission, tithing, etc
 3. Interpersonal Relations
family members, friends, co-workers, small groups, etc
 4. Personal Growth
addiction, conflict avoidance, anger issues, counseling, assertiveness, etc
 5. Professional Development
Book of Confessions, Bible Content, Internship, CPE, mentorship, leadership, certifications, etc

4 **Review Covenant and Process with Person**

- Inquirer/Candidate and Advocates return.
- If voted to keep inquirer/candidate in the process, all clap as inquirer/candidate returns to the room. Liaison presents Inquirer/Candidate/Post-Finalist with a stone and today's date written on it.
- Moderator or liaison reviews bullet points for covenant and explains that liaison will send final covenant to inquirer/candidate for signature and return to liaison.

1 **Final Prayer**

A circle is formed and the liaison offers a prayer of blessing.

CPM Checklist

Name: _____

✘ TO INQUIRER

From the Student

- Form 1A – Application to be Enrolled as an Inquirer
- Form 1C – Estimated Financial Planning
- Form D – Education Checklist

On File with Presbytery

- Form A – Psy Assess Release
- Form B – Sexual Misconduct
- Form C – Receipt of Policies
- Form E – Criminal Background Check

From Presbytery

- Transcript (conferral of baccalaureate)
- Psychological Assessment
- Internship, CPE, work evaluations

From Session

- Form 1B – Session Evaluation & Recommendation

✘ TO CANDIDACY

From the Student

- Form 3 – Annual Consultation Form
- Form 5A – Application to be Enrolled by Presbytery as a Candidate
- Form D – Ed Check List
- Statement on sense of call to ministry and experience in the church (For Presbytery appearance)

From Presbytery

- “Book of Life”
- Updated transcript
- Internship, CPE, work evaluations

From Session

- Form 5B – Session Evaluation & Recommendation

✘ FOR FINAL ASSESSMENT

From the Student

- Form 3 – Annual Consultation Form
- Form D – Education Check List
- Statement of Faith- revised
- Sermon

On File with Presbytery

- Ords Exams
- Psychological Assessment
- Cert. Sexual Misconduct Prevention
- Cert. Getting into Shape Fiscally

From Presbytery

- Book of Life
- Updated transcript
- Internship, CPE, work evaluations

Post Interview

- Form 6 – Summary Report of Final Assessment

✘ FOR ANNUAL

From the Student

- Form 3 – Annual Consultation Form
- Form D – Ed. Check List

From Presbytery

- Book of Life
- Updated transcript
- Internship, CPE, work evaluations

✘ Certifications, Assessments, Approvals

	Approved	Eval/Cert/Passed Rec'd
Internship (800 hours)		
CPE (400 hours)		
Work in the Church		
Bible Content		
ORDS (after 2 FT years of Seminary)		
Circulate PIF (must have passed ORDS)		
Sexual Misconduct		
Fiscal Fitness		
Transcripts		

All forms – May be found in the Steps Paper and at www.presbyteryofsf.org

GUIDELINES FOR CPM APPROVALS

*Approvals must be secured in advance, prior to beginning CPE, internships, etc.
Requests must be in writing and should be emailed to both Erika Glisson (eglisson@sfpby.org) and your liaison.
Requests must be received at least 1 week before the scheduled CPM meeting.*

- 1. For Employment – Church or Other Ministry Work**
 - a. Name of organization and location
 - b. Supervisor title, and contact information
 - c. Job description with time commitment (hours per week)
 - d. Anticipated dates of employment
 - e. Compensation

- 2. CPE (1 unit from accredited site required)**
 - a. CPE center, location and accreditation status by ACPE
 - b. CPE supervisor
 - c. Job description with total number of hours (40 hours/week x 10 weeks = 400 hours)
 - d. Dates of the program (start and completion dates)
 - e. Cost of CPE unit.

- 3. Internship (800 hours minimum) or a year long CPE Residency**
 - a. Internship organization, location
 - b. Supervisor with credentials and contact information
 - c. Supervisory schedule (weekly, bi-weekly, etc)
 - d. Dates of the internship (start and completion dates)
 - e. Job description with total number of hours (FT/PT with hours per week) detailing
 - (1) Responsibilities that relate to Presbyterian practice/polity (attendance at session, presbytery, etc)
 - (2) Worship leadership, preaching, teaching, and pastoral care
 - f. Compensation
 - g. Compare and contrast how this internship differs from other church experience, i.e. social context, membership, theological perspective, racial/ethnic makeup, age.

- 4. To Take ORDS (must have completed 2 full-time years of theological study)**
 - a. Date and location of proctored examinations
 - b. Which ORDS you have passed and which ORDS you are taking
 - c. If retaking a failed exam, a written plan outlining remedial steps to insure passage of exam is required.

- 5. To Circulate PIF**
 - a. Date of successful completion of Bible Content and ORDS exams
 - b. Start date of Candidacy
 - c. Confirmation in final year of school

- 6. Alternate Educational Plans**
 - a. Rationale for alternate plan
 - b. Course syllabus or equivalent
 - c. Teacher contact information and credentials
 - d. Form of evaluation and credits

- 7. Financial Reimbursement (receipts required)**
 - a. Psychological Assessment – Presbytery pays 1/3, sponsoring church pays 1/3
 - b. Airline Travel – Presbytery pays 1/3 for the cost of no more than 2 economy roundtrip tickets per year.

- 8. Financial Assistance (not reimbursement for travel expenses or Psych Assessment)**
 - a. Amount of request and purpose of request
 - b. Describe current financial situation, including budget sheets, and why making request
 - c. Indicate other financial assistance received, including CPM
 - d. Will not exceed \$1,250 for the duration of time under care

CREDIT FOR PREVIOUS CHURCH WORK IN PARTIAL FULFILLMENT OF THE INTERNSHIP REQUIREMENT

Requests must be in writing and should be emailed/mailed to both Erika Glisson (eglisson@sfpby.org) and your liaison. Requests must be received at least 1 week before the scheduled CPM meeting.

- 1. For credit to be considered for previous church work, indicate the following:**
 - a. Regular supervision with written evaluations
 - b. Pastoral responsibilities, i.e. preaching, teaching, pastoral care, worship leadership
 - c. Setting that differs demographically from current or sponsoring church experience
 - d. Field experience that met M.DIV. requirements

- 2. A Summary Statement of Previous Church Experience including:**
 - a. Church name and location
 - b. Supervisor with credentials and contact information
 - c. Supervisory schedule (weekly, bi-weekly, etc)
 - d. Dates of the internship/employment
 - e. Job description with total number of hours (FT/PT with hours per week) detailing
 - 1) Responsibilities that relate to Presbyterian practice/polity (attendance at session, presbytery, etc)
 - 2) Worship leadership, preaching, teaching, pastoral care
 - 3) Leadership responsibilities
 - 4) All other duties
 - f. Compensation
 - g. Compare and contrast how this internship/employment differs from other church experience, i.e. social context, membership, theological perspective, racial/ethnic makeup, age.
 - h. All self and supervisory written evaluations including personnel reviews if applicable
 - i. Any theological reflection type papers written in fulfillment for field education requirements

- 3. The committee will review your request.**
 - a. Internship credit may be given for up to 400 hours.
 - b. Only in very rare cases will full credit be given for previous church work (e.g. 5 year experience working as Full time pastor in another denomination).
 - c. Some remedial requirements may be required, such as attending session and Presbytery meetings, working with a Presbyterian pastor as a mentor, preaching in churches, etc.

CPM FORM D – EDUCATION CHECK LIST

Name _____

Note: Completing an M.Div. does not necessarily mean the educational requirements of the CPM have been met. It is the student’s responsibility (not the CPM’s) to ensure that all courses meet our requirements.

Area Requirements – list title of the classes	School	Date	Course #	Sem/Qtr	Units
BIBLICAL STUDIES: <i>Old and New Testaments courses, 2 classes in each testament.</i>					
Semester: 4 classes (3 units ea) = 12 semester units OR Quarter: 4 classes (4 units ea) = 16 quarter units					
OT – Pentateuch focus					
OT					
NT – Gospels focus					
NT – Pauline focus					
LANGUAGE AND EXEGESIS: <i>1 year each of Hebrew and Greek language. Exegesis classes: one in exegetical method and two requiring application of the exegetical method, one in each language. If exegesis paper required, a biblical studies or exegetical method class may “double count” for exegetical application requirement.</i>					
Semester: 7 classes (3 units ea) = 21 semester units OR Quarter: 8 classes (4 units ea) = 32 quarter units					
Hebrew 1					
Hebrew 2					
Greek 1					
Greek 2					
Exegesis Method (Greek or Hebrew)					
Applied – Greek					
Applied – Hebrew					
SYSTEMATIC THEOLOGY: <i>Must reflect a Reformed perspective and include nature of God, revelation-scripture, theological anthropology, Christology, salvation-atonement, Holy Spirit, church, mission, sacraments, and eschatology.</i>					
Semester: 2 classes (3 units ea) = 6 semester units OR Quarter: 3 classes (4 units ea) = 12 quarter units					
CHURCH HISTORY: <i>Covers church history (ancient church to present) including the Reformation</i>					
Semester: 2 classes (3 units ea)=6 total semester units OR Quarter: 3 classes (4 units ea)=12 total quarter units					
PRACTICAL THEOLOGY:					
Semester: 5 classes (3 units ea)=15 semester units OR Quarter: 5 classes (4 units ea)=20 quarter units					
Homiletics/Preaching					
Pastoral Care and Counseling					
Spiritual Formation*					
2 Practical Theology Electives**					
PRESBYTERIAN COURSES: 1 class each, semester or quarter					
Reformed Worship & Sacraments					
Presbyterian Polity					
Book of Confessions <i>(If a systematic theology, historic theology, or polity class covers the Confessions, it may “double count.”)</i>					
ELECTIVES: list on back					

- * An Alternate Educational Plan may be requested in order to meet this requirement
- ** Electives must be selected from the following subject areas: Ethics, Mission, Evangelism, Christian education, Leadership, Administration. These 2 classes must be from distinctively different subject areas (e.g. Mission and Ethics)
- ~ The CPM must approve in advance all Alternate Education Plans.
- ~ Distance/online learning classes are not encouraged. Pre-approval is required.
- ~ Required classes must be taken for credit. Neither pass/fail nor auditing is allowed.
- ~ If not attending a PC(USA) seminary, obtain approvals for completing systematic theology and the Presbyterian courses. You may incur additional expenses in order to complete these classes at a Presbyterian institution. Distance/on-line learning is not encouraged for Presbyterian courses. Pre-approval is required.

Revised 01/13/08

SEMINARY CONTACTS

Revised 6/2014

School	Name	Position	Telephone/Email
Austin	Jacqueline Hefley	Registrar	512-472-6736
	Rev. Jacqueline Saxon	Vice President for Student Affairs and Vocation	512-404-4885
Fuller – So. Cal.	Rev. Chris Murphy	Director, Office of Presbyterian Ministries	626-584-5575
Fuller – No. Cal.	Rev. Dr. Curt Longacre	Regional Director, Office of Presbyterian Ministries	curt@fuller.edu ; 650-321-8606
Gordon Conwell	William Levin	Registrar	978-646-4021; regstr@gcts.edu
	Lita Schlueter	Dean of Students/Director of Student Life Services	978-646-4021
Louisville	Steve Cook	Registrar	800-264-1839, ext. 429; scook@lpts.edu
	Kilen Gray	Dean of Students	502-992-9367; kgray@lpts.edu
McCormick	Elizabeth Caldwell	Associate Dean of Students & Academic Affairs	lcaldwell@mccormick.edu ; 773-947-6329
	Jim Courtney	Registrar	jcourtney@mccormick.edu ; 773-947-6285
Princeton	Cathy Cook Davis	Associate Dean of Student Life & Director of Senior Placement	609-497-7882
	Catherine Ahmad	Office Admin. Staff	609-497-7880
	David Wall	Registrar	david.wall@ptsem.edu
	Deborah Davis	Director, Field Education	609-497-7970
Regent	Ann Zlindra	Assistant Registrar/Academic Advisor	604-221-3302; azlindra@regent-college.edu
	Diane Stinton	Dean of Students	604-221-3343; dstinton@regent-college.edu
SFTS	Susan Lawlor	Registrar	slawlor@sfts.edu
	Rev. Elizabeth McCord	Associate Dean for Vocation	emccord@sfts.edu
Union-PSCE	Rafael Ortiz	Registrar	212-280-1342 rortiz@uts.columbia.edu
	Yvette Wilson	Associate Dean of Student Affairs	ywilson@uts.columbia.edu ; 212-280-1396

CERTIFICATION OF COMPLETION OF EDUCATION REQUIREMENTS

Inquirer/Candidate Name: _____

CPM Liaison: _____

	Date Certifying Completion	Auditor
Baccalaureate Degree (attach transcript)		
Baccalaureate Transcript Received		
Education Institution:		
Degree Conferred:		
Date Degree Conferred:		
CPM Requirements (attach approved alternative ed. plans & most recent Form D – Education Check List)		
Biblical Studies		
Languages		
Theology		
Church History		
Practical Theology		
Presbyterian Courses		
Master of Divinity (attach final transcript)		
Final Transcript Received		
Theological Institution:		
Degree Conferred:		
Date Conferred:		

All Education Requirements Certified Completed

Name: _____

Date: _____