

**Presbytery of San Francisco
Committee on Preparation for Ministry (CPM)**

Steps and Procedures for Ordination

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Chapter 1 – Introduction to the CPM Process

The Committee on Preparation for Ministry (CPM) of the Presbytery of San Francisco joyfully serves its congregational members who are responding to a sense of God's call in their lives to the ministry of the Word and Sacrament. This discernment process affords these members the opportunity to explore their sense of call, evaluate their gifts for ministry, and assess their readiness to accept a call to the ministry of the Word and Sacrament in the PC(USA).

1.01 Five Key Areas (Growth Objectives)

The CPM will evaluate the progress of an individual in five key areas:

1. Education for Ministry – evaluation of the individual's academic potential, progress, and reflection on the meaning of educational experiences in relationship to ministry;
2. Spiritual Development – reflection on and deepening maturity in one's faith journey, spiritual practices, and spiritual discernment;
3. Interpersonal Relations – assessment and growth in how one relates to others, leadership style and gifts, and what this means in terms of ministry;
4. Personal Growth – maturing awareness of and growth in one's self-understanding, sense of call, and personal stewardship; and
5. Professional Development – development of specific skills that will deepen and expand one's ability to understand and respond to the ministry context, manage conflict, and be effective as a minister and presbyter.

1.02 Covenant Partnership

The preparation process is most effective when it reflects the biblical theme of covenant relationship. The covenant partners in this relationship are the individual, the local session, the CPM, and the theological institution. All partners share in assessing God's call for the individual and all commit to prayer, diligence, respect, open communication, and accountability.

The covenant partners' responsibilities include:

1. The Individual
 - a. Active membership in a particular Presbyterian church and, as such, subject to the concern and discipline of that church.¹
 - b. Prayer for discernment and open reception to the wisdom of the various covenant partners.
 - c. Submission to the oversight of the CPM in all matters related to preparation for ministry.²
 1. Quarterly contact with the CPM liaison.
 2. Required annual consultation with the CPM.
 3. Advanced approvals as required by the CPM.
 4. Completion and timely distribution of all paperwork, forms, certifications, etc.
 5. Fulfillment of the covenant agreement developed annually with the CPM.
 6. Use church processes if conflict arises.
 - d. Responsibility for completing all the requirements.
 - e. Maintenance of a complete file containing copies of all paperwork, evaluations, course syllabi, certifications, ORDS exams, etc.

¹ G-2.0605 All citations are taken from the Book of Order, 2011-2013 edition.

² G-2.0605

2. The Session
 - a. Interviews and recommends endorsement of the individual at the key CPM milestones of inquiry and candidacy.
 1. Provides ongoing guidance and feedback about spiritual and emotional maturity.
 2. Assesses readiness for ministry leadership.
 - b. Commits to pray for the individual and provide pastoral care.
 - c. Appoints a ruling elder and a pastor to be advocates for the individual. These advocates are
 1. required to attend inquiry, candidacy, and final assessment interviews, and
 2. recommended to attend annual consultations.
 - d. Provides financial support.³

3. The CPM and the Presbytery
 - a. Commit to pray for the individual.
 - b. Appoint a CPM liaison to guide and resource the individual through the process.
 - c. Exercise responsibility for the spiritual growth of inquirers and candidates.⁴
 - d. Support and give guidance in regard to
 1. course of academic study and choice of theological institution
 2. field education (internships and CPE)
 3. familiarity with the Scriptures, Presbyterian Polity and with the Confessions
 4. financial planning and need
 5. faith and polity of the church, and
 6. emotional and spiritual growth.
 - e. Show sensitivity to each individual's unique background, experience, level of maturity, theological perspective, and personal attributes.
 - f. Maintain a complete and permanent file on the individual.

4. The Theological Institution
 - a. Provides a Reformed academic curriculum that will ensure adequate intellectual, spiritual, ecclesiastical, and professional development for students pursuing ministry.
 - b. Assesses readiness for and supervises field education, internships and other experiences crucial to the student's spiritual, personal and professional development.
 - c. Conducts programs for the development of personal and professional skills.
 - d. Submits to the Presbytery an annual report on the student's progress towards preparation for ministry.

1.03 The Process of Discernment

While covenant defines the relationship, discernment is the primary process of the covenant partners. Discernment involves attending to the Holy Spirit's leading and the individual's learning, self-examination, and evaluation in academic, professional, and personal arenas. The intent of this process is clarification leading to a sense of vocation and, as such, any number of outcomes is possible including:

1. no confirmation of a call to ordained ministry
2. confirmation that other vocational options (e.g. lay ministry) are more fitting and promising, or
3. certification of readiness for examination for ordination, pending a call, to the ministry of the Word and Sacrament.

1.04 Preparation for Ministry vs. Validation of Call

The purview of the CPM is the process of preparation for ministry of the Word and Sacrament and

³ While the previous Book of Order required Sessions to offer financial support, the new Book of Order does not. It is the hope of the CPM that Sessions will continue to support the people under their care in this way but encourage individuals to confirm that with their Sessions.

⁴ G-2.0605

therefore it has no role in determining the validity of a specific call. The calling agency (local church, governing body, hospital chaplaincy, etc.) extends the call to the candidate. It is up to the presbytery of call, through its Committee on Ministry (COM), to determine the validity of the call in one of three categories:

1. service in congregations
2. service in other ministry of the church
3. service beyond the jurisdiction of the church.⁵

1.05 Overview of Ordination Process

A minimum of two years is required to proceed through the steps towards ordination to the ministry of the Word and Sacrament: one year as an inquirer and one year as a candidate.⁶ If the process takes longer, and it usually does, the inquirer or candidate is required to meet annually with the CPM.

The preparation for ministry process involves three critical milestones for the covenant partners:

1. Inquiry Phase – *exploration* of the call to the ministry of the Word and Sacrament
2. Candidacy Phase – *affirmation* of the call to the ministry of the Word and Sacrament
3. Final Assessment – *certification* of readiness for examination for ordination, pending a call, to the ministry of the Word and Sacrament

Detailed steps for moving through these milestones are delineated in chapters 2-4.

1.06 Overview of the Requirements

The Presbytery of San Francisco has additional requirements to those mandated in the Book of Order. In some instances, these requirements exceed the educational and experiential requirements of Master of Divinity programs from accredited theological institutions, even PC(USA) seminaries.

It is up to the individual, and not the CPM, to proactively complete all the requirements of the Presbytery of San Francisco. This includes timely submission of all paperwork, securing advanced approvals, and regular contact with the CPM liaison and the CPM.

Some of these requirements are time-sensitive and must be completed in order to advance through the preparation process. Other requirements can be completed during any phase of the process. However, all requirements must be completed before the final assessment.

Prerequisite Requirements

1. Six months active membership in endorsing church of the Presbytery of San Francisco.
2. Baccalaureate degree from a regionally accredited college or university.⁷

Summary of Requirements

1. Quarterly contact with CPM liaison and annual contact with CPM
2. Approvals as required by the CPM
3. Timely submission of all paperwork and forms

⁵ G-2.0503a

⁶ G-2.0602

⁷ G-2.0607b While the Book of Order requires completion of the baccalaureate before final assessment, the Presbytery of San Francisco requires the completion of the baccalaureate before the application to inquirer will be accepted. Exceptions may be granted under extraordinary circumstances.

4. Psychological Assessment
5. Receipt of and adherence to “Standards of Ethical Conduct”
6. Receipt of and adherence to the “Sexual Misconduct Prevention Policy and Procedures of the Presbytery of San Francisco”
7. Sexual Misconduct Self-Certification
8. Submission to a Criminal Background Check
9. Statement of Faith
10. Educational Requirements including a Master of Divinity from accredited theological institution and completion of the specified educational requirements of the Presbytery
11. 1 unit (400 hours) accredited Clinical Pastoral Education (CPE) or approved equivalent
12. 800 hours of a pastoral internship or approved equivalent
13. Comprehensive Exams including Bible Content and Standard Ordination Exams (ORDS)
14. Certification in Maintaining Professional Boundaries
15. Certification in PC(USA) Board of Pension’s Fiscal Fitness, “Getting into Shape Fiscally”
16. Sermon preached to the candidate’s sub-group of CPM

These requirements are fully discussed in *Chapter 6 – Requirements*.

1.07 Overview of Financial Resources Available

Financial Assistance

Students are encouraged to look for all possible sources for financial aid to support their theological education and preparation in the ordination process. Those sources include their theological institution, session and congregation; and outside loans, scholarships, and grants.

The Presbytery of San Francisco is not able at this time to provide significant financial assistance. However, emergency funds may be available for special needs, not to exceed a total of \$1,250 during the time under care. Inquirers and candidates may apply to the CPM for small grants through their liaison. A complete explanation of the need and of the individual's financial situation will be required for committee consideration. See Appendix 3 for the necessary information for submission. Due to the limits of the purpose and scope of the fund, not all requests will be granted.

Additionally, the CPM provides reimbursement for 1/3 of travel expenses to attend regularly scheduled CPM meetings and 1/3 of the fees for psychological assessment. Please submit all receipts to the Presbytery staff liaison.

***As daunting as this paperwork may seem,
we are convinced that this preparation process will offer you a rich
season of discernment.***

***May God be with you and the CPM as we travel together
on this journey of discerning call!***

Chapter 2 – Application To Become An **INQUIRER**

In the Presbyterian Church, call is discerned within community. During the inquiry phase, the individual explores the call to ministry with the various covenant partners. These include his or her church, the presbytery, and the theological institution – all of which are engaged in the discernment process. The CPM and the inquirer will learn more about each other, assess the individual's spiritual maturity, emotional health, and gifts for ministry, and set goals for growth and development.

OVERVIEW OF THE PROCESS AND FORMS FOR APPLICATION TO BECOME AN INQUIRER

- 2.01 Overview of the Application Process to Become an Inquirer
- a. Be an active member of a local Presbyterian church for at least six months.
 - b. Meet with the pastor advocate.
 - c. Initiate contact with the CPM staff of the Presbytery of San Francisco.
 - d. Meet with and enter into covenant relationship and receive the endorsement with session of the sponsoring church.
 - e. Apply to Master of Divinity programs at a regionally accredited Theological Institution.
 - f. Discern and covenant with the Presbytery.
 1. Complete the psychological assessment at an approved testing site.
 2. Schedule the inquiry interview with the CPM.
 3. Contact the CPM liaison to review the process and expectations for the inquiry interview.
 4. File and distribute paperwork and forms to the CPM.
 - g. Submit reimbursement for travel expenses.⁸
 - h. Arrange transcripts to be sent to the Presbytery at the completion of each term.
 - i. Complete a Criminal Background Check.
- 2.02 Forms and Paperwork – Distribute one month in advance as directed by Presbytery staff.
- a. Official transcript indicating conferral of baccalaureate degree from a regionally accredited institution.⁹
 - b. Official transcripts for any graduate work.
 - c. Form 1A – *Application to be Enrolled by Presbytery as an Inquirer*
 - d. Form 1B – *Session Evaluation and Recommendation Regarding Enrollment as an Inquirer*
 - e. Form 1C – *Estimated Financial Planning for Theological Education*
 - f. CPM Form A – *Psychological Assessment Release Form*
 - g. CPM Form B – *Sexual Misconduct Self-Certification*
 - h. CPM Form C – Receipt of and Adherence to “*Standards of Ethical Conduct*” and the “*Sexual Misconduct Prevention Policy and Procedures of the Presbytery of San Francisco.*”
 - i. CPM Form D – *Education Check List*
 - j. CPM Form E – *Criminal Background Check Release Form*
 - k. Acceptance of Grievance Procedures
 - l. Psychological Assessment (sent directly from the testing center to the Presbytery)
 - m. Self and supervisory evaluations from any field education, internships, CPE, or previous employment in the church

If you are endorsed as an inquirer, you **will not** need to meet with the entire Presbytery

⁸ The CPM will reimburse one-third the cost of airline travel only (CPM does not reimburse for rental car, gas, overnight accommodations, etc.) for interviews before the CPM and the Presbytery, not to exceed more than two round-trip economy fare tickets per year.

⁹ A prerequisite requirement for application, this must be on file with the CPM before application to become an inquirer will be accepted.

DETAILED STEPS FOR APPLICATION TO BECOME AN INQUIRER

Discernment with the Local Church

- 2.03 Active Membership Requirement – Six months in a congregation of the Presbytery of San Francisco.
- 2.04 Applicant Meets with Pastor/Teaching Elder
The applicant and the pastor prayerfully discern the sense of call together.
1. The pastor honestly assesses the applicant's readiness to enter this process in terms of spiritual and emotional maturity, gifts for ministry, and fiscal health.
 2. The pastor can assist the applicant by providing an overview of the ordination process and giving them the contact information for the Presbytery of San Francisco.
 3. On behalf of the applicant, the pastor notifies the session of the applicant's intent to enter into the ordination process.

Initiating the Process with the Presbytery

- 2.05 Applicant Contacts Presbytery
The individual requests an application binder, which includes:
1. The Presbytery's "Steps and Procedures" paper
 2. Copies of all CPM forms
 3. *Standards of Ethical Conduct*
 4. *Sexual Misconduct Policy and Procedures of the Presbytery of San Francisco*, and
 5. Other miscellaneous resource materials.

Covenant with the Session

- 2.06 Applicant Completes Pre-Enrollment Documents
The applicant completes pre-enrollment documents and provides signed copies to the session, the elder advocate, and the pastor.
1. Form 1A – *Application to be Enrolled by Presbytery as an Inquirer*
 2. Form 1B – *Session Evaluation and Recommendation Regarding Enrollment as an Inquirer*
 3. Form 1C – *Estimated Financial Planning for Theological Education*
- 2.07 CPM Arranges Orientation with Session (as needed)
It is recommended that before the Session meets with the applicant, the clerk or moderator of the Session contacts the Presbytery to request a CPM orientation, which covers the specific duties and responsibilities of the session in the preparation/discernment process. The Session Moderator, Clerk and appointed Elder Advocate (if one has been chosen) are invited to attend. The documents that are provided to the session by CPM give guidance to the session as it considers whether to endorse the applicant as an inquirer.

Note: The orientation may be waived if a session orientation has been conducted with that particular session within the previous twelve months or the church has a standing candidates' care committee of the session.

- 2.08 Session Action and Endorsement of Applicant to Inquirer
1. The session discerns whether or not to endorse the applicant's desire to be enrolled by the Presbytery as an Inquirer. Minutes of the meeting should reflect their action. The following assumes endorsement of the applicant.
 2. The session appoints an elder advocate. The Ruling Elder does not need to be currently serving on session. This person works with the applicant throughout the preparation process.

3. Session designates a pastor advocate.
4. Session answers the questions listed on Form 1B
5. Session approves financial support including at a minimum:
 - a. 1/3 cost of psychological assessment
 - b. Consideration of other types of financial assistance, such as travel expenses to and from CPM meetings, book funds, family expense funds and/or emergency needs funds.

2.09 Session Interviews Applicant and Makes a Recommendation

When interviewing a prospective inquirer, the session should give primary attention to evaluating natural gifts, quality of commitment, strength of motivation, and potential for growth. The following questions from Form 1B – *Session evaluation and recommendation regarding enrollment as an inquirer* should be completed by the session and submitted to the Presbytery.

2.10 Session Submits Completed and Signed Forms to the Presbytery

The session reports to the Presbytery its specific recommendation on the person's request to be enrolled as an inquirer. Signed forms should include:

1. Form 1A – *Application to be Enrolled by Presbytery as an Inquirer*
2. Form 1B – *Session Evaluation and Recommendation Regarding Enrollment as an Inquirer*
3. Form 1C – *Estimated Financial Planning for Theological Education*

Covenant with the Theological Institution

2.11 Selection of a Theological Institution

The Presbytery requires classes on Reformed theology and worship as well as Presbyterian polity, Confessions and the Biblical languages of Hebrew and Greek. Students need to be aware of these requirements when selecting classes and CPM is willing to help verify that courses meet this requirement, especially if a student is not enrolled at a Reformed or PC(USA) seminary.

Theological institutions provide assessment for field education as well as academic achievement.

1. By signing Form 1A – *Application to be Enrolled by Presbytery as an Inquirer*, the applicant allows the CPM to make inquiries about his/her academic progress, field education work, and other general inquiries.
2. The student shall arrange for transcripts to be sent automatically to the Presbytery at the completion of each term.

Discernment with Presbytery

2.12 Schedule the Inquiry Interview with the CPM

1. The applicant schedules an interview date with the CPM. The date will be confirmed once the Presbytery staff has received all of the paperwork including completed and signed forms from the session. All paperwork (including the psychological assessment) must be received no less than one month in advance of the interview.
2. The applicant informs the pastor and the elder advocate of the date, time, and location of the interview. Both pastor and elder advocate must be present in order to be interviewed to be enrolled as an inquirer.

2.13 Psychological Assessment

The applicant must participate in a program of psychological assessment at a CPM approved testing site. See Appendix 1.

1. Plan on a minimum of three months from the time of testing until the final report is received by the Presbytery Staff. It is the responsibility of the applicant (not the testing site) to ensure that the Presbytery has received the report no less than one month before the inquiry interview.
2. The applicant must sign CPM Form A – *Psychological Assessment Release Form*, which authorizes the testing site to send the psychological assessment to the Presbytery.

3. The applicant must arrange for payment (1/3 CPM, 1/3 local church, 1/3 individual).

2.14 CPM Appoints Liaison from the CPM

The CPM liaison serves as the main vehicle for communication, support, and encouragement with the individual. The liaison will help the individual explore and assess their suitability for ministry.

1. It is the liaison's responsibility to make initial contact with the applicant and set up a time to discuss the process and expectations before the CPM interview.
2. Thereafter the Inquirer/Candidate shall maintain quarterly contact with the liaison, either by phone, electronically or in person (in person is preferred but not always feasible)
3. The applicant shall provide updated contact information to the CPM staff and liaison including all phone numbers, email addresses, and mailing addresses.

2.15 Paperwork Submitted to the Presbytery by the Applicant

1. Applicant distributes paperwork one month in advance to the pastor, elder advocate, and CPM members as directed by the Presbytery Staff and brings two extra complete sets to the interview.
 - a. Official transcript indicating conferral of baccalaureate degree from a regionally accredited institution¹⁰
 - b. Official transcripts for any graduate work.
 - c. Form 1A – *Application to be Enrolled by Presbytery as an Inquirer*
 - d. Form 1B – *Session Evaluation and Recommendation Regarding Enrollment as an Inquirer*
 - e. Form 1C – *Estimated Financial Planning for Theological Education*
 - f. Evaluations from previous field education, internship, CPE or work in the church.

2.16 CPM Interviews Applicant and Makes a Recommendation

The CPM will make a preliminary assessment of the applicant's motives, seriousness of intent, and general suitability for ministry of the Word and Sacrament.

1. The CPM liaison shall confirm there is no criminal history, shall contact references, the psychological testing site, theological institution staff, and any supervisors for work in the church, internships or CPE for further information.
2. Discussion topics for this interview might include:
 - a. Applicant's self-introduction including current situation and personal background, Form 1A
 - b. Psychological assessment
 - c. Personal and emotional development
 - d. Spiritual development
 - e. Professional development
 - f. Education plans
 - g. Evaluations from previous internships, CPE, or work in the church
 - h. Pastoral concerns for the individual and his or her family
 - i. Financial planning, including the funds needed to complete education and the CPM requirements
3. The elder advocate and pastor will be asked to speak about the applicant's experience, call, gifts and suitability for ministry.

2.17 The CPM makes a Recommendation to the Presbytery

The CPM shall vote whether or not to recommend to the Presbytery that the applicant be enrolled as an inquirer, effective the date of the CPM interview. If the vote is positive, the CPM and the newly advanced Inquirer enter into a covenant relationship.

¹⁰ A prerequisite requirement for application, this must be on file with the CPM before application to become an inquirer will be accepted.

Enrollment as an Inquirer

2.18 Presbytery Enrolls Individual as an Inquirer

1. The Presbytery votes to enroll the applicant as an inquirer via the Presbytery's omnibus motion. The applicant does not need to be present at this meeting of the Presbytery.
2. The inquiry phase begins on the date of the CPM interview and shall be no less than one year.

The Inquiry Phase

2.19 Period of Exploration of Call

1. Inquirer works on fulfilling covenant agreement (growth objectives).
2. Inquirer checks in with CPM liaison quarterly.
3. Inquirer secures any appropriate advanced approvals for various requirements including CPE, internships, educational plans, ORDS exams, work in the church, etc.
4. Inquirer meets with the CPM annually; one such visit can be advancement to candidacy.
5. Inquirer adheres to the "Growth objectives for the Future" from Form 1A
6. The CPM may explore the ministerial suitability of the inquirer through the contact with personal references, supervisors, spiritual directors, the session, and the inquirer's institution of learning.

Chapter 3 – Application To Become A **CANDIDATE**

The purpose of the candidacy phase is to affirm the call to the ministry of the Word and Sacrament. The candidate will work towards the completion of all the requirements, work on the growth objectives established by the CPM, and, together with the CPM, continue to prayerfully discern the leading of the Holy Spirit as it relates to being called to a validated ministry as a minister of the Word and Sacrament.

OVERVIEW OF THE PROCESS AND FORMS FOR APPLICATION TO BECOME A CANDIDATE

- 3.01 Overview of the Application Process to become a Candidate
- a. Complete all the requirements listed under the inquiry phase.
 - b. Discern with your CPM liaison and pastor the appropriate time to move to candidacy. If so discerned, then:
 - c. 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:
 - d. Schedule candidacy interview with the CPM.
 - a) File and distribute paperwork and forms to the CPM one month in advance.
 - b) Talk with your CPM liaison about the expectations for the candidacy interview.
 - e. Notify the pastor and the elder advocate of the date, time, and location of the interview. They must be present for the CPM to consider endorsement to candidacy.
 - f. If the CPM moves to endorse, then the inquirer will be interviewed by the Presbytery.
 - g. Submit reimbursement for travel expenses.¹¹
- 3.02 Forms and Paperwork – Distribute one month in advance as directed by Presbytery staff.
- a. Form 3 – *Annual Consultation Form*
 - b. Form 5A – *Application to be Enrolled by Presbytery as a Candidate*
 - c. Form 5B – *Session Evaluation and Endorsement Regarding Enrollment as a Candidate*
 - d. CPM Form D – *Education Check List*.
 - e. Any self and supervisory internship or field education evaluations, if applicable.
 - f. Any self and supervisory CPE evaluations, if applicable.
 - g. Updated transcript.

If the CPM decides to recommend to Presbytery to enroll you as a Candidate, the Presbytery will interview you. Your interview will take place at least three to six weeks after the interview with CPM.

¹¹ The CPM will reimburse one-third the cost of airline travel only (CPM does not reimburse for rental car, gas, overnight accommodations, etc.) for interviews before the CPM and the Presbytery, not to exceed more than two round-trip economy fare tickets per year.

**DETAILED STEPS
FOR APPLICATION TO BECOME A CANDIDATE**

3.03 Confer with the CPM liaison

1. The CPM liaison shall contact references, theological institution staff, and supervisors for work in the church, internships, or CPE for further information on the inquirer in preparation for this discussion.
2. With the liaison, the individual should discuss and prayerfully discern if he or she is ready to advance to candidacy.
3. Consideration should be given to the individual's progress on meeting the educational and experiential requirements (internship and CPE), their plans for taking the ORDS exams, and progress on their growth objectives. If the inquirer has no prior experience working in the church or some ministry site, some field education experience is required before advancement to candidacy will be considered.
4. The conversation should include a thorough discussion about the individual's emotional, interpersonal, and spiritual development as well as the individual's sense of call.
5. If there is a mutual sense of God's leading to advance, move ahead with the process. If not, the process of exploration as inquirer continues.

3.04 Inquirer Meets with the Pastor

The pastor engages in prayerful discussion and discernment with the inquirer and assesses his/her emotional and spiritual maturity. If the pastor affirms that God is leading the inquirer to advance, the pastor schedules the candidacy interview with the session. If not, the process of exploration as an inquirer continues.

3.05 Inquirer Completes all the Required Paperwork for Advancement to Candidacy

The Inquirer shall provide signed copies to the session and to the pastor.

1. Form 3 – *Annual Consultation Form*
2. Form 5A – *Application to be Enrolled by Presbytery as a Candidate*
3. CPM Form D – *Education Check List*.
4. Any self and supervisor internship or field education evaluations, if applicable.
5. Self and supervisory CPE supervisor evaluations, if applicable.
6. Updated transcript.

3.06 Session Interviews Inquirer and Makes Recommendation

The Session binder provides guidance to the session as it considers whether to endorse the inquirer as a candidate. The session should review the paperwork, keeping the following questions in mind:

1. Spiritual Issues:
 - a. How would you describe the inquirer's commitment to God and to the world?
 - b. How does he/she express and integrate a mature understanding of his/her Christian faith?
 - c. Is he/she Reformed in his/her theology?
2. Personal Issues:
 - a. How does he/she demonstrate self-awareness, self-direction, and a sense of responsibility?
 - b. How effective are his/her people skills?
 - c. How does he/she seem to tolerate stress and conflict?
 - d. Are there financial obstacles, health limitations, family, or spouse considerations?
 - e. Are the inquirer's present goals feasible and realistic?
3. Educational/Experiential Issues:
 - a. Does he/she demonstrate adequate academic skills?
 - b. Does he/she have adequate ministry experience in the church or other contexts?

4. Occupational Issues:
 - a. How does the inquirer relate to authority figures?
 - b. Is the inquirer's blend of temperament, abilities, coping style, values, and motivation suitable for the ministry of the Word and Sacrament?
 - c. Does the inquirer have a realistic understanding of the occupational demands and job opportunities for ministry?
 - d. What is the inquirer's commitment to the PC(USA)?
 - e. Should he/she consider specialized ministry or alternate occupations?

3.07 Session Action and Endorsement of Inquirer to Candidate

The session discerns whether or not to endorse the inquirer's request to be enrolled by the Presbytery as a candidate. Minutes of the meeting should reflect their action. The following assumes endorsement of the inquirer to candidacy.

3.08 Session Submits Completed and Signed Forms to the Presbytery

The session reports to the Presbytery its specific recommendation on whether or not the person should be endorsed as a candidate. Two sets of signed originals should include:

1. Form 5A – *Application to be Enrolled by Presbytery as a Candidate*
2. Form 5B – *Session Evaluation and Endorsement Regarding Enrollment as a Candidate*

The two sets of originals are then forwarded to the Presbytery Staff.

Discernment with the CPM

3.09 Schedule the Candidacy Interview

1. The inquirer schedules an interview date with the CPM. The interview date will be confirmed once the Presbytery has received all the paperwork including completed and signed forms from the session. All paperwork must be received no less than one month in advance of the interview.
2. The inquirer informs the pastor and elder advocate of the date, time, and location of the meeting. The pastor and elder advocate must be present in order for the advancement to candidacy to be considered.

3.10 Paperwork Submitted to the Presbytery by the Inquirer

1. Inquirer distributes all the paperwork one month in advance to the pastor, the elder advocate, and CPM members as directed by the Presbytery Staff. He/she shall bring two extra complete sets to the interview.
 - a. Form 3 – *Annual Consultation Form*
 - b. Form 5A – *Application to be Enrolled by Presbytery as a Candidate*
 - c. Form 5B – *Session Evaluation and Endorsement Regarding Enrollment as a Candidate*
 - d. CPM Form D – *Education Check List*.
 - e. Any self or supervisory internship or field education evaluations, if applicable.
 - f. Any self or supervisory CPE evaluations, if applicable.
 - g. Updated transcript.

3.11 CPM Interviews the Inquirer

1. Discussion topics for this interview might include:
 - a. Updating the CPM on what has happened in the inquirer's life including any pastoral concerns for the individual and his or her family,
 - b. Discussion of the "Three Statements", Form 5A – *Application to be Enrolled by Presbytery as a Candidate*
 - c. Evaluations from internships, field education, CPE, work in the church, etc.,

- d. Progress on covenant from those listed on Form 3
- e. Progress on ORDS,
- f. Progress on certifications,
- g. A conversation about the inquirer's understanding of the lordship of Jesus Christ and how this understanding influences decisions and conduct related to relationships, sexual ethics, finances, and other life choices and behaviors.
- h. Any other supporting documentation requested by the CPM.

2. Required Questions and Discussion

- a. The inquirer and the CPM will identify any departures, issues, or questions related to the Reformed faith, PC(USA) polity. Any departures, issues, or questions will be noted in the internal confidential minutes of the CPM and not placed in any motion in the presbytery minutes for advancement to candidacy
- b. Inquirer will be asked the questions for candidacy.¹²
 - 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)?
- h. Inquirer urged to prayerfully review and reflect upon the ordination questions.
- i. The elder advocate and the pastor will be asked to speak about the inquirer's growth, experience, call, gifts, and suitability for ministry.

3.12 The CPM makes a Recommendation to the Presbytery

- 1. The CPM shall vote whether or not to recommend to the Presbytery that the inquirer be advanced to candidacy, effective the date of the CPM interview.
- 2. If the CPM does not endorse the inquirer to candidacy, then:
 - a. The CPM may vote to allow the person to continue in the process; the covenant agreement will reflect the issues and how they will be addressed in the five growth areas.
 - b. The CPM may vote to remove the person from the process.

3.13 The CPM and the Inquirer Continue the Covenant Relationship

The CPM and the inquirer continue in a covenant relationship recorded on Form 3 – Annual Consultation Report.

Discernment with the Presbytery

3.14 Presbytery Examines the Inquirer for Candidacy and acts on the recommendation to enroll the person as a candidate.

- 1. The Presbytery shall interview the inquirer and vote on the motion to advance to candidacy. The interview with the Presbytery will take place at least three to six weeks after the interview with CPM.
- 2. The inquirer arranges for the pastor, the elder advocate, and any other congregational members, family, and friends to be present at the Presbytery meeting (encouraged for supportive purposes).
- 3. The interview takes place as follows:

¹² While the Book of Order no longer mandates these questions, the Presbytery chooses to ask these questions.

- a. The interview takes place during the CPM report.
- b. The inquirer presents a 2-minute overview of his/her sense of call to ministry and experience in the church. It is recommended that the inquirer consult with his or her liaison about what to present, writing out a one-page script.
- c. The liaison asks the first question which has been agreed upon with the inquirer in advance.
- d. The Moderator fields questions which are restricted to the topics of the inquirer's Christian faith, forms of Christian service undertaken, and motives for seeking the ministry.
- e. Once the questions are arrested, the inquirer is escorted from the room for the period of discussion, deliberation, and voting by Presbytery.¹³
- f. If advancement is approved, the new candidate shall be escorted back into the room. Two persons may speak for one minute in support of the new candidate.
- g. The moderator or designee asks the questions for candidacy and then offers a brief charge and prayer.
- h. The candidate's name shall be recorded on the Presbytery's roll of candidates.
- i. The candidacy phase shall last a minimum of one-year and begins on the date of the CPM interview.¹⁴

3.15 Forms are Signed and Distributed

1. Form 5A – *Application to be Enrolled by Presbytery as a Candidate*
2. Form 5B – *Session Evaluation and Recommendation Regarding Enrollment as a Candidate*

The Candidacy Phase

- 3.16 Remaining requirements shall be completed.
 1. Candidate works on fulfilling the growth objectives.
 2. Candidate checks in with the CPM liaison quarterly.
 3. Candidate secures any appropriate advanced approvals for various requirements including circulation of PIF, CPE, internships, educational plans, ORDS exams, work in the church, etc.
 4. The candidate submits all supervisory and self-evaluations, transcripts, certifications, and ORDS exams.
 5. The candidate meets with the CPM annually until the CPM certifies the candidate “ready for examination, pending a call” or until the candidate is removed from the preparation process.

¹³ CPM chair will report back to the liaison and candidate if there is any significant discussion while the candidate is gone from the room.

¹⁴ G-2.0602

Chapter 4 – **FINAL ASSESSMENT**

The purpose of the final assessment is to evaluate and certify the candidate's readiness for examination for ordination to the ministry of the Word and Sacrament. Before the final assessment can be scheduled, all the requirements in the preparation process must be completed. The candidate may not formally receive or accept a call until he or she is certified "ready for examination for ordination, pending a call."

OVERVIEW OF THE PROCESS AND FORMS FOR THE FINAL ASSESSMENT

- 4.01 Overview of the Criteria and Process for Final Assessment
1. Verify that all the ordination requirements have been completed.¹⁵
 2. Psychological Assessment
 3. Updated Statement of Faith
 4. Self and supervisory evaluations – signed originals
 - a) Internships and field education
 - b) CPE
 5. Comprehensive Exams (Bible Content and originals of all ORDS Exams) passed successfully.
 6. Certifications
 - a. Sexual Misconduct Prevention Training
 - b. Getting into Shape Fiscally Seminar
 7. Educational Requirements – completed by the end of the term
 - a. Be in final term of theological education or have graduated with a Master of Divinity degree.
 - b. All Presbytery required courses
 - c. Updated transcripts. The final certified transcript indicating conferral of a Master of Divinity must be on file with the Presbytery before a receipt of a call.
 8. Discern with the CPM Liaison the appropriate time to proceed with the final assessment.
 9. Schedule final assessment with the CPM.
 - a. Distribute appropriate paperwork to sub-committee at least one month in advance.
 - b. Talk with your CPM liaison about the expectations of the final assessment.
 10. The Candidate is to notify the pastor and the elder advocate of the date, time, and location of the interview. They must be present at the final assessment.
 11. Submit reimbursement for travel expenses.¹⁶
- 4.02 Forms and Paperwork – Distribute one month in advance as directed by Presbytery staff in order to be on the CPM docket. This firm deadline makes it possible for CPM to adequately process the paperwork in preparation for the interview.
- a. Form 3 – *Annual Consultation Report*.
 - b. CPM Form D – *Education Check List*.
 - c. *Statement of Faith* – revised.
 - d. Sermon (see Appendix 6 for specific requirements).
 - e. All self and supervisory evaluations for internships, field education, CPE, and work in the church.
 - f. Updated transcript.

¹⁵ G-2.067 b, c, and d

¹⁶ The CPM will reimburse one-third the cost of airline travel only (CPM does not reimburse for rental car, gas, overnight accommodations, etc.) for interviews before the CPM and the Presbytery, not to exceed more than two round-trip economy fare tickets per year.

DETAILED STEPS FOR THE FINAL ASSESSMENT

Discern with the CPM Liaison

- 4.03 Confirm all requirements and paperwork are completed
The candidate shall confirm with the Presbytery Staff and liaison that all the requirements have been completed and that the Presbytery file is complete.

The one exception may be the completion of educational requirements. The student must be in the final term of their educational program and will need to substantiate the anticipated completion of all the educational requirements as well as the date of graduation.

- 4.04 Confer with the CPM liaison
1. The CPM liaison may contact references, the psychological testing site, theological institution staff, and supervisors for work in the church, internships, or CPE for further information on the candidate in preparation for this discussion.
 2. Discuss and prayerfully evaluate the Candidate's readiness for the final assessment. The conversation should include a thorough discussion about the candidate's emotional, interpersonal, and spiritual development as well as confirmation of his/her sense of call. If there is a mutual agreement, then the final assessment can be scheduled.
- 4.05 Schedule the Final Assessment
1. The candidate schedules the final assessment with the CPM. The interview will be confirmed once the Presbytery Staff has received all the paperwork.
 2. The candidate informs the pastor and elder advocate of the date, time, and location of the interview. The Pastor and Elder Advocate, along with the assigned CPM liaison, must be present at the final assessment.
- 4.06 Paperwork Submitted to the Presbytery by the Candidate
1. The candidate distributes all the paperwork one month in advance to the pastor, the elder advocate, and CPM members as directed by the Presbytery staff and brings two extra complete sets to the interview.
 - a. Form 3 – *Annual Consultation Report*.
 - b. CPM Form D – *Education Check List*.
 - c. Statement of Faith – revised.
 - d. Sermon (see Appendix 6 for specific requirements)
 - e. All self and supervisory evaluations for internships, field education, CPE, and work in the church.
 - f. Certifications (Sexual Misconduct Prevention Seminar and Getting into Shape Fiscally).
 - g. Updated Transcript.

CPM Conducts Final Assessment with the Candidate

- 4.07 CPM Interviews the Candidate
1. The CPM liaison will contact references, the psychological testing site, theological institution staff, and supervisors for work in the church, internships or CPE for further information on the candidate in preparation for this interview.
 2. After introductions, the interview will begin with the candidate preaching a **15**-minute sermon.

3. Discussion topics for the final assessment might include:
 - a. Sermon
 - b. Exegetical discussion on your sermon
 - c. Statement of Faith,
 - d. Review of all the evaluations for internship, CPE, field education, and other work in the church,
 - e. Progress on growth objectives listed on CPM Form 3,
 - f. Pastoral concerns for the individual and his or her family,
 - g. Verification of the plan for completion of educational requirements,
 - h. Personal and emotional development,
 - i. Spiritual development,
 - j. Professional development, and
 - k. Anything else the CPM might deem relevant.

4. Required Questions and Discussion
 - a. A conversation about the inquirer's understanding of the lordship of Jesus Christ and how this understanding influences decisions and conduct related to relationships, sexual ethics, finances, and other life choices and behaviors.
 - b. The candidate 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 the ordination vows.
 - c. Any departures, issues, or questions identified by the individual or the CPM 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.
 - d. The candidate will be asked the ordination questions. These questions will be asked again at the time of ordination.¹⁷
 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 fulfill your ministry 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 pray for and seek to serve the people with energy, intelligence, imagination, and love?
 9. Will you be a faithful Teaching Elder, 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. The elder advocate and pastor will be asked to speak about the inquirer's growth, experience,

¹⁷ W-4.4003

call, gifts, and suitability for ministry.

4.08 CPM Makes Its Determination

The CPM makes one of the following motions:

1. Move that (*name*) be found certified ready for examination effective (*today's date*).
2. Move that (*name*) be found certified ready for examination (*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 CPM can certify the candidate ready for examination. The outstanding issues will be addressed in five growth objectives.
4. Move that (*name*) be removed from the ordination process effective (date of next Presbytery meeting).

The following assumes certified ready for examination, pending a call.

CPM and the Candidate Covenant Together

4.09 The CPM and the candidate continue in a covenant relationship.

CPM makes Its Recommendation to the Presbytery

4.10 The chair of the CPM submits Form 6 – *Summary Report of Final Assessment of Candidate's Readiness to be Examined for Ordination*

The motion to certify shall be reported at the next Presbytery meeting¹⁸ by means of the Omnibus Motion. The effective date will be the date of the CPM interview. Should there be a departure attached to the recommendation, the motion shall not be placed on the Omnibus Motion and will be discussed and voted on at the next scheduled meeting of the Presbytery.

Candidacy Continues – Post Finalists

4.11 Form is Signed and Distributed

1. Form 6 – *Summary Report of Final Assessment of Candidate's Readiness to be Examined for Ordination*.

4.12 Post-finalist candidates who have been found certified ready for examination shall remain on the rolls while they are actively seeking an ordainable call. Candidate maintains ongoing contact with the CPM.

- a. Remains in regular contact with the CPM liaison.
 - b. Participates in ongoing consultations with CPM representatives.
 1. These consultations should be at least once every 18 months and may be completed in person, by phone or video conference.
 2. Consultations may be with a designated sub-group of CPM of 2 or more people.
 3. These annual consultations will include the review of previous growth objectives and the development of a new covenant.
 4. It shall also include a recommendation to the CPM to extend his or her status as a candidate or a recommendation to remove them from the process.
2. Remaining under the care of the Presbytery of San Francisco will be contingent in part upon:
- a. Active participation in a PC(USA) congregation,

¹⁸ G-2.0607

- b. Active support of the session by maintaining membership and annual contact with endorsing/sponsoring church,
 - c. Demonstration of ongoing personal and professional development in ministry,
 - d. Demonstration of progress toward pursuing a validated call, and
 - e. Progress in relation to growth goals (covenant) established during the previous annual consultation.
3. An extended length of time under care may be granted in specific situations such as
 - a. Further graduate study and
 - b. Changing personal, financial, and family circumstances.
 4. Every third year of post-final status, a meeting with the candidate's sub-committee, along with the pastor and elder advocate is required for a full review of their status as a candidate.

Termination of Candidacy

4.13 Termination of Candidacy

1. Candidacy is not a permanent ecclesiastical status in the Presbyterian Church (USA). It is the responsibility of the CPM to review the candidate's progress toward ordination and his or her understanding of call to the ministry of Word and Sacrament.
2. If the CPM determines that an extension of status as a candidate is in question or is unlikely, the candidate and the CPM will discuss termination of candidacy. If removal is mutually-agreed upon, or if the committee finds sufficient reason to do so, the committee shall proceed with removal of candidate from the process.¹⁹
3. Please note that failure to remain in regular contact with the CPM liaison and meet regularly with CPM may be sufficient grounds for the CPM to remove a candidate from the process. CPM members will attempt to communicate this with as much notice and grace as possible.

¹⁹ G-2.0609

Chapter 5 – ANNUAL CONSULTATION

Annually, each person meets with the CPM for continued nurture and assessment. The annual consultation serves to evaluate the spiritual growth and needs of the individual, to assess progress on fulfilling the requirements of the CPM, to plan financially, and to assess an inquirer or candidate's status in the preparation process. Progress on previously established growth objectives is reviewed and new goals are established.

When the individual meets with the CPM for the application to candidacy and for the final assessment, these are considered annual consultations.

OVERVIEW OF THE PROCESS AND FORMS FOR THE ANNUAL CONSULTATION

5.01 Overview of the Annual Review

1. Contact the CPM liaison to schedule an annual consultation and discuss what type of interview it will be (e.g. candidacy, final, annual, post-finalist). If an annual, then:
2. Schedule the annual consultation.
 - a. File and distribute paperwork and forms to the CPM.
 - b. Talk with your CPM liaison about the expectations for the annual consultation.
3. Contact the pastor and the elder advocate and notify them of the date, time, and location of the interview. It is recommended but not required that they attend the annual consultation (unless this interview is a three year post-finalist annual. In that case, the pastor and elder advocates are required to attend).
4. Submit reimbursement for travel expenses.²⁰

5.02 Forms and Paperwork – Distribute one month in advance as to the entire sub-committee of CPM.

- a. Form 3 – *Annual Consultation Form*
- b. CPM Form D – *Education Check List*
- c. Any self or supervisory internship or field education evaluations, if applicable
- d. Self and supervisory CPE evaluations, if applicable
- e. Updated transcript

You **will not** need to meet with the Presbytery following your annual consultation

²⁰ The CPM will reimburse one-third the cost of airline travel only (CPM does not reimburse for rental car, gas, overnight accommodations, etc.) for interviews before the CPM and the Presbytery, not to exceed more than two round-trip economy fare tickets per year.

**DETAILED STEPS
FOR THE ANNUAL CONSULTATION**

Discernment with the CPM

5.03 Individual Schedules the Annual Consultation

1. The individual contacts the CPM Liaison to discuss the scheduling of the annual consultation.
2. Annual consultations may be held by the CPM at their regularly scheduled meetings or may be conducted by 2-3 persons appointed by the committee at some other place and time.

5.04 Paperwork Distributed to the Presbytery

Paperwork is distributed one month in advance to CPM members as directed by the Presbytery Staff. Two extra, complete sets of the paperwork should be brought to the interview.

1. Form 3 – *Annual Consultation Form*
2. CPM Form D – *Education Check List*, if applicable.
3. Any self or supervisory internship, field education, or CPE evaluations, if applicable.
4. Updated transcript, if applicable.

CPM Interviews Individual

5.05 Discussion topics for this interview might include:

1. Pastoral concerns for the individual and his or her family
2. Progress on Covenant Agreement
3. Advanced approvals
4. Progress on seeking a call, and
5. Other supporting documentation requested by CPM

CPM Makes a Report to the Presbytery

5.06 Each annual shall include a motion whether or not to continue the individual in the process.

CPM and Inquirer Covenant Together

5.07 The CPM and the Inquirer or Candidate continue in a covenant relationship.

Chapter 6 – **REQUIREMENTS**

The requirements of the Presbytery of San Francisco are in full compliance with the Book of Order. The Presbytery mandates additional requirements to provide the best preparation for those called to the ministry of the Word and Sacrament.

OVERVIEW OF REQUIREMENTS

The individual shall keep copies of all paperwork related to the CPM process including all academic syllabi and academic work. The Presbytery staff maintains a complete file with originals of all paperwork, psychological assessments, self and supervisory evaluations, certifications, Ordination exams, correspondence, advanced approvals, etc.

Completion of the requirements is the responsibility of the individual and not the CPM.

Prerequisite Requirements

1. 6 months active membership in endorsing church
2. Baccalaureate degree from accredited institution

Requirements

1. Regular Contact with CPM
 - a. Quarterly Contact with the CPM Liaison (in person or electronically)
 - b. Communicate changes in contact information (e.g. change of address, phone, email)
 - c. Meet annually with the CPM
2. Paperwork and Forms – complete and timely submission
3. Receipt and Adherence to Policies
 - a. Standards of Ethical Conduct
 - b. Sexual Misconduct Prevention Policy and Procedures of the Presbytery of San Francisco
 - c. Sexual Misconduct Self-Certification
4. Psychological Assessment (Inquiry)
5. Submit to a criminal background check (inquiry)
6. Statement of Faith (Candidacy and Final Assessment)
7. Sermon (Final Assessment)
8. Educational Requirements
 - a. Master of Divinity from accredited theological institution
 - b. Specific required coursework by the Presbytery
 - c. Official transcripts (from college and theological institutions)
9. Supervised Experiential Requirements
 - a. Accredited CPE – 1 unit (400 hours) or approved equivalent
 - b. Supervised Practice of Ministry – 800 hours minimum or approved equivalent
10. Written Comprehensive Exams
 - a. Bible Content (should be taken during Inquirer stage)
 - b. ORDS exams (after 2 years of full-time theological education)
11. Certifications
 - a. Sexual Misconduct Prevention
 - b. Getting into Shape Fiscally
12. Advanced Approvals in writing for
 - a. Internships
 - b. CPE
 - c. Work in the Church
 - d. ORDS
 - e. Circulate PIF
 - f. Alternative Education Plans

DETAILED DESCRIPTIONS OF THE REQUIREMENTS

6.01 Prerequisite Requirements

1. Active Membership Requirement
2. Six months membership in the endorsing congregation of the Presbytery of San Francisco is required prior to application to become an inquirer.
3. Baccalaureate degree from a regionally accredited college or university.
 - a) An official transcript indicating conferral of a baccalaureate degree must be on file with the CPM before the application to become an inquirer will be accepted.²¹

6.02 Regular Contact with CPM

1. The individual maintains quarterly contact with his or her CPM Liaison to check in for prayer, progress on the growth objectives, pastoral care, and advanced approvals.
2. Anyone in the preparation process shall meet annually with the CPM. The individual should initiate the scheduling of these interviews with the CPM Liaison or the CPM Presbytery staff.
3. The individual keeps both the CPM Liaison and the CPM Presbytery staff informed of any changes in contact information including change of address, phone number, email, etc.

6.03 Paperwork and Forms

1. Distribution of Forms
 - a. The CPM requires that certain forms be submitted in ample time for the CPM committee members to read and review. Generally, all paperwork should be distributed one month before any interview with the CPM.
 - b. To determine which forms are required for a particular interview, see the checklist on the first page of the chapter detailing the process for that phase in the preparation process.
 1. All forms can be found on the Presbytery of San Francisco's website, www.presbyteryofsf.org. Copies of these forms are included in the Application binder. Lettered forms can be found under Appendices 9-15.
 - c. It is up to the individual to be sure that all paperwork is completed, signed, and filed properly
2. Covenant Agreement
 - a. Form 3 – *Annual Consultation Form* is used to capture and report on the student's progress on the covenant with the Presbytery.
 - b. After every CPM interview/annual consultation, a new covenant agreement covering the five growth areas is drawn up and agreed to.
3. Three Statements (Candidacy)
 - a. At the end of the inquiry phase, the individual shall demonstrate adequate promise for ministry by presenting a written response on three statements as requested on Form 5A – *Application to be Enrolled by Presbytery as a Candidate*. One of these is the Statement of Faith, the requirements of which are listed in Steps Paper – section 6.07.

6.04 Receipt and Adherence to Policies

Two policies are included with the STEPS paper:

1. The Standards of Ethical Conduct (PC(USA)), and
2. The Sexual Misconduct Prevention Policy & Procedures of the Presbytery of San Francisco.

While in the process of preparation for ordination, all inquirers and candidates must adhere to these

²¹ G-2.0607b. While the Book of Order requires completion of the baccalaureate before final assessment, the Presbytery of San Francisco requires the completion of the baccalaureate before the application to inquirer will be accepted. Exceptions may be granted under extraordinary circumstances.

policies.

1. CPM Form C – *Standards of Ethical Conduct and the Sexual Misconduct Policy and Procedures of the Presbytery of San Francisco* must be signed and submitted to the Presbytery before the application to inquiry can be complete. (Appendix 11)
2. CPM Form B – *Sexual Misconduct Self-Certification* is mandatory and must be signed and submitted to the Presbytery before the application to inquiry can be complete. (Appendix 10)

6.05 Criminal Background Check (Inquiry)

1. A criminal background check shall be conducted prior to the individual becoming an Inquirer. Results received from this background check will be placed in the applicant's permanent file and reported to the CPM liaison and subgroup.

6.06 Psychological Assessment (Inquiry)

1. Scheduling and funding the Psychological Assessment
 - a. A comprehensive, in-depth psychological and career assessment conducted by an accredited testing site is required by the CPM before the initial applicant's interview for endorsement to become an inquirer. Written results from the psychological assessment are valid for up to 3 years. The testing psychologist may consult with the CPM for up to 1 year following the written report.
 - b. It is the responsibility of the applicant to schedule the psychological assessment in enough time for the full report to be received at least 1 month prior to the initial interview with CPM.
 - c. The applicant shall sign a release form allowing the testing center to send the psychological assessment to the Presbytery (CPM Form A – *Psychological Assessment Release Form*).
 - d. The applicant shall arrange for payment (1/3 CPM, 1/3 local church, 1/3 individual).
2. The Purpose of the Assessment
 - a. The assessment is conducted by a credentialed professional, (i.e. licensed psychologists) who are trained in psychological testing and understand the professional and personal implications of ordination to the ministry of the Word and Sacrament
 - i. Tests do not give the whole picture of a person but can be helpful in the assessment of appropriate temperament for ministry, communication skills, conflict resolution, career and ministry aptitude, family of origin issues, and overall psychosocial health.
 - b. The CPM treats these assessments with the same care it does for all individuals in the preparation for ordination process. Outcomes and recommendations are fully discussed with the individual coming under care so that a mutual understanding can emerge.
 - c. Both the CPM and the applicant make use of the assessment to identify and evaluate areas of strength and growth so together they can explore the call to ministry. Such assessments may provide background and goals for the covenant agreement.
3. Distribution of the Assessment
 - a. The assessment is the confidential property of the CPM and the original will be kept in permanent file of the person under care.
 - b. Copies of the assessment are distributed to the Psychological Assessment Sub-Committee, the CPM chair, and all members of the CPM sub-group to which the person has been assigned. Once the assessments have been processed, these copies are shredded to maintain the highest standards of discretion and confidentiality.
 - c. Copies of the psychological assessment may be released to other presbyteries with the written permission of the individual. Such requests are often made when the individual is being considered for ordination or when a transfer to another presbytery has been requested.

6.07 Statement of Faith (Candidacy and Final Assessment)

1. This brief (one-page, single-spaced, typed) statement should express the individual's personal faith in his or her own words. It should not be a restatement of the Apostles' or Nicene Creed or any other affirmation of faith.
2. It should address the major themes of Christian doctrine and the Reformed tradition including:
 - a. Belief about God,
 - b. The Trinity,
 - c. Humanity,
 - d. Scripture,
 - e. Sin and evil,
 - f. The nature and mission of the Church,
 - g. The Sacraments (both baptism and Lord's Supper),
 - h. The nature of Christian ministry, and
 - i. Eschatology.
3. The CPM will assess whether or not the candidate's theological views are compatible with the confessional documents of the church. This will be based on the prepared statement of faith and the candidate's ability to expand upon, pastorally apply, and defend his or her views. At the Final Assessment, any departure(s) from Reformed doctrine will require a separate theological essay outlining position, assumptions and conclusions to support each departure. This theological essay will accompany the one-page Statement of Faith.

6.08 Educational Requirements

1. The CPM provides guidance in regard to courses of study, practical training, and plans for education, including the choice of institutions.

2. Master of Divinity Required

A diploma and official transcript showing satisfactory grades from a theological institution accredited by the Association of Theological Schools must be on file with the CPM in order for the candidate to be eligible for ordination.

3. Educational Requirements of the CPM – Appendix 5

- a. Completion of a Master of Divinity does not necessarily mean that all of the CPM educational requirements have been met. It is the individual's responsibility (not the CPM's) to ensure that all courses meet the CPM's requirements.
 1. The educational requirements are detailed in Appendix 5.
 2. Consult Appendix 5 regularly when planning your theological coursework.
 3. Prior to each term, consult with the CPM liaison before registering for classes
 4. When in doubt, consult with the Education Sub-Committee of the CPM.
- b. Reporting on Education Requirements
 1. CPM Form D – *Education Check List* shall be submitted every time an individual meets with the CPM until all the education requirements have been met. (Appendix 12)
 2. The student shall arrange to have official transcripts sent to the Presbytery after each term.
- c. Pass/Fail, Auditing, Distance Learning
 1. Required classes must be taken for credit.
 2. Auditing is not allowed.
 3. A maximum of 12 online courses for an M.Div. will be accepted. There are no restrictions as to which courses may be taken online within a seminary's M.Div. program, although it is recommended to take the Presbyterian Courses (Theology, Polity, etc.) in person to facilitate better integrated learning in preparation for taking the Ordination Exams.

- d. Presbyterian Coursework at Non-Presbyterian Seminaries
 1. For those attending non-Presbyterian seminaries, educational plans for completing systematic theology (must be from a reformed perspective) and the Presbyterian courses must be discussed and approved by the Education Sub-Committee and the CPM.
 2. Additional expenses may be incurred in order to complete these classes at a Presbyterian theological institution. A maximum of 12 online courses will be accepted. There are no restrictions as to which courses may be taken online within a seminary's M.Div. program.
- e. Alternate Education Plans
 1. Any alternate education plan must be approved in advance by the CPM Education Sub-Committee and the CPM. Written requests should include:
 2. Rationale for alternate plan,
 3. Course syllabus or equivalent,
 4. Teacher contact information and credentials, and
 5. Form of evaluation and credits.

6.09 Experiential Requirements: CPE and Internship

The Presbytery of San Francisco requires both one unit of Clinical Pastoral Education (CPE) and 800 hours of pastoral internship.

1. General Guidelines
 - a. Approvals for CPE and pastoral internships must be secured in advance. No exceptions.
 - b. The field education or internship requirement for a particular theological institution may or may not meet the criteria for the CPM. Therefore, the student needs to make an additional effort to locate an acceptable placement that meets the requirements of the theological institution and the CPM. Consult with the CPM liaison for guidance about appropriate placements.
 - c. Evidence of ministerial skill is attested by written evaluations from both the supervisor and individual. If the supervisory evaluations reflect the need for additional experiences and skill development, the CPM may require other internship or CPE placements.
2. **CPE (Clinical Pastoral Education)**
 - a. The CPE experience exposes an individual to critical pastoral situations such as prisons and hospitals, in which they discover and develop skill and attitudes related to urgent situations. The individual will participate in intense small group, peer feedback and evaluation of ministerial skills, pastoral identity, and interpersonal relationships.
 - d. One unit of CPE (minimum of 400 hours) from an accredited site is required.
 - e. Advanced approval for the CPE is required. Submit in writing:
 1. Name and location of the CPE site and indicate accreditation status from the ACPE.
 2. Name of the CPE supervisor
 3. Job description with total number of hours (40 hrs/wk x 10 weeks = 400 hrs).
 4. Dates of the program (start and completion dates).
 5. Cost of the CPE unit.
 - f. A student may request and CPM will consider on a case-by-case basis, a similar pastoral education program offered in a clinical setting that has a supervisor, a peer group of at least three students in ministry, foci on pastoral formation, authority and reflection, supervisor and self evaluation and 400 hours of training of which at least 100 hours are in group learning.
 - g. The final self and supervisory evaluation must be submitted to the CPM by the supervisor within 45 days of completion of the CPE unit.
 - h. For previous CPE experience to be considered as meeting this requirement, the CPE unit must have been completed within 7 years of being enrolled as an inquirer.

3. **Pastoral Internship**

- a. The pastoral internship exposes and allows the individual to practice a broad range of pastoral functions including preaching, worship leadership, visitation, session and presbytery meetings, and conflict management in a PC(USA) congregation setting. The CPM may recommend or require that particular responsibilities be included in the position description based on the unique work experience and background of the individual.
- b. The CPM requires a pastoral internship of a minimum of 800 hours
 1. It is imperative to work with both the CPM and the theological institution when planning and securing approvals for internships. The field education/internship requirement of a Master of Divinity program may differ from the criteria of the CPM. Work with the CPM liaison well in advance when planning and securing approvals for an internship placement.
 2. The CPM recognizes that previous work in the church may have been a helpful step in the discernment of call. Working as a church volunteer or church staff member may be similar but not the same as the pastor's role in a church. Such work may or may not meet the criteria for the internship requirement. See Appendix 4 for the criteria for previous work to be considered.
 3. CPE subsequent units may be counted toward fulfillment of a portion of the required 800 hours of internship. If this is the case, an additional internship in a parish or pastoral setting may be required (including PC(USA) polity experience).
- c. The setting for the pastoral internship must differ significantly from the individual's previous congregational experience (e.g. social context, membership, theological perspective, racial/ethnic makeup, and age).
 1. The purpose of this requirement is to provide exposure to the breadth and diversity of the life of the PC(USA) within the denominational, national, and global context.
 2. The CPM recognizes that the internship requirements for bicultural and racial ethnic people may differ.
 3. The CPM will consider the uniqueness of each person and work sensitively to honor both the background and goals of each person as well as require challenging education-in-ministry experiences.
- d. Advanced approval for internships is required. Submit in writing:
 1. Internship organization and location,
 2. Supervisor with credentials and contact information,
 3. Supervisory schedule (weekly, bi-weekly, etc.),
 4. Dates of internship (start and completion dates),
 5. Job description with total number of hours (FT/PT with hours per week) detailing responsibilities that relate to Presbyterian practice/polity (attendance at session, presbytery, etc.),
 6. Worship leadership, preaching, teaching, and pastoral care,
 7. Compensation, and
 8. Compare and contrast how this internship differs from other church experiences. i.e. social context, membership, theological perspective, racial/ethnic makeup, age.
- e. Regular supervision (at least twice a month) is required for the duration of the internship.
 1. Interim and final self and supervisory evaluations must be submitted to the CPM by the supervisor within 30 days of completion of the pastoral internship.
- f. An internship assignment that requires an individual to function as the sole pastor for a particular church will require the counsel, approval, and oversight of the CPM as well as the Committee on Ministry (COM) having jurisdiction over that church.
 1. "No inquirer or candidate who has not been previously ordained as a ruling elder may serve as moderator of a session, administer the Sacraments, or perform a marriage ceremony. An inquirer or candidate previously ordained as a ruling elder may be authorized to administer the Lord's Supper when invited by a session."²²

²² G-2.0606

6.10 Written Comprehensive Exams

The Written Comprehensive Exams include the Bible Context Examination and the Standard Ordination Exams (ORDS). All the exams are administered by the Office of Examination Services of the PC(USA). For registration deadlines and applications, see www.pcusa.org/exams. Registration for this exam is done on-line only.

1. Bible Content Examination

- a. The Bible Content examination is intended to assess one's knowledge of stories, themes, and pertinent passages in the Old and New Testaments. The two-hour examination contains 100 multiple-choice questions about the contents of the Bible, using the New Revised Standard Version for all quotations.²³
- b. The Bible Content Exam is ordinarily taken in the first year of theological study or during the inquiry phase. The test is administered twice annually in early February and the Friday before Labor Day. Advanced permission to take the exam is not needed. Exams may be written in English, Spanish or Korean.

2. Senior Standard Ordination Examinations (ORDS)

- a. The ordination examinations are designed to determine one's entry-level readiness for ministry. The exams present pastoral challenges whereby candidates can demonstrate how they integrate faith and theological education in practical ministry. Specifically, the four areas covered include:
 1. Open Book Biblical Exegesis,
 2. Theological Competence,
 3. Worship and Sacraments, and
 4. Church Polity.
 - b. Individuals can take the exams after two full years of theological study have been completed, and not before.
 - c. The exams are administered four times a year: January, April, July and October
 - d. Recently, the Office of Examinations has determined that Standard Ordination Exams are no longer valid beyond five years. If you remain under care beyond that timeframe, you must retake the exams again.
 - e. The CPM will evaluate the readiness of the individual to take the exams. When taking the exams for the first time, the CPM strongly recommends that individuals write all four comprehensive exams at the same time. Statistically, passing rates are higher when all four exams are taken together.
 - f. Advanced approval by the CPM is not required for first time exam takers. The Candidate shall confirm with his or her liaison that it is acceptable to register for the exams (the CPM chair will affirm that request once the on-line registration has been submitted).
 - g. If retaking a failed exam or exams, approval is required and the written request shall include:
 1. Which ORDS you will be retaking and
 2. A written plan outlining remedial steps to insure passage of the exam(s) and
 3. Date and location of the proctored examination
3. All five examinations (Bible Content and ORDS) must be successfully completed before permission can be granted for the individual to circulate their Personal Information Form (PIF), unless special action is taken by Presbytery and Synod.
 4. To ensure passage after the failure to pass an ORDS exam
 - a. Before permission can be granted for an ordination exam to be retaken, the individual must inform the CPM in writing of the plan of action to insure passage on the next attempt. The plan should include:

²³ A website that allows you to take and grade previous exams can be found at www.whitneyhq.com/biblecontent.

1. a realistic self-appraisal aimed at the deficiencies revealed by the failure of the examination, and
2. a specific plan for overcoming those deficiencies through a program of independent study, coaching, and/or additional academic work.
- b. Consultation with the CPM liaison is essential when developing the remedial plan
- c. When the request is to retake an exam for a third or fourth time:
 1. Completion of the plan may be required before permission will be granted to take the examination again.
 2. The CPM may also evaluate whether or not to continue the individual in the process.
 3. If the CPM believes that the individual should be certified as “ready for examination for ordination, pending a call,” it may petition the Presbytery to determine an alternate means to satisfy competence in the area of difficulty. Such action requires the approval of three-fourths of the Presbytery.²⁴

6.11 Certifications

1. Sexual Misconduct Prevention

- a. The individual must complete a daylong Sexual Misconduct Prevention Training Seminar for ministers. This class is offered from time to time by the Presbytery of San Francisco and by many seminaries.
- b. Copy of the certification must be provided for credit to be granted.

2. Fiscal Fitness Policy

- a. The CPM will include in its care and counsel attention to issues of debt management and other fiscal responsibilities. We encourage the session to work with the individual around the financial implications of financing their education as well as the challenges of income potential for ministry of the Word and Sacrament.
- b. In addition, CPM requires that all candidates attend The Board of Pension’s “Getting Into Shape Fiscally” Seminar. This seminar is specifically designed for students in their last year of seminary. This is so that students receive the most up-to-date information on topics such as negotiating the package for your first call. Registration information can be found at <http://www.pensions.org/educationalresources/financial&retirementplanning/seminars>. Attendance at other seminars that relate to fiscal responsibility is encouraged.
- c. Copy of certification must be provided for credit to be granted.

6.12 Advanced Approvals

1. All requests must be in writing and should include
 - a. The date, your name and your latest contact information (address, phone, email).
 - b. All requests should be emailed to your CPM liaison and to the Presbytery staff. Keep copies of all documentation for your files.
 - c. To determine what information is necessary for an advanced approval, see Appendix 3 – *Guidelines for CPM Approvals*.
2. Advanced permission from the CPM must be granted before undertaking many of the CPM requirements, including:
 - a. CPE.
 - b. Internship, and
 - c. Permission to take the ordination exams including the retaking of failed exams.
3. In addition to approvals for some requirements, advanced approvals must be submitted in writing and secured before undertaking:

²⁴ G-2.0610

- a. **Work in the church or other ministry work**
 - 1. Job description
 - 2. Supervisor title and contact information
 - 3. Time commitment (hours per week)
 - 4. Compensation
- b. **Permission to circulate PIF**
 - 1. Date of successful completion of Bible Content and ORDS exams.
 - 2. Date of Candidacy
 - 3. Confirmation that student is in final year of Master of Divinity program or has graduated.
 - 4. Information on the search process, including downloading blank PIF forms can be found at <http://www.pcusa.org/clc>
- 4. Activities that qualify for **financial reimbursement from the Presbytery** (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 fare round-trip tickets per year.
- 5. With a maximum of \$1,250, the student may draw up to that amount upon prior written request through the liaison.

6.13 Sermon – Appendix 6

- 1. The sermon requirement involves two separate components:
 - a. A written version of the sermon (typed, double spaced).
 - b. 15-minute oral delivery of the sermon presented at the final assessment.
- 2. The written portion must be distributed one month in advance to CPM members as directed by the Presbytery staff.

Chapter 7 – ***Withdrawal and Reinstatement***

These options will only be considered after all parties (the individual, CPM and Session) have been consulted and it has been determined that this is the right move.

7.01 – Withdrawal from Process

1. Should a person under care of the Presbytery of San Francisco find it necessary to withdraw from the ordination process, the CPM requires a written notification to that effect. Notifications should be made to the liaison with a copy sent to the Presbytery office, the person's Session as well as Pastoral Advocate.
2. Please be advised that while our current policy may allow for reinstatement to the process should a person change their mind, there is no guarantee that future policies will continue to allow this. All students currently under care will be notified before the policy is changed.
3. If the individual would like to meet one final time with the CPM we would welcome a chance to talk and pray with the individual.

7.02 – Suspending the Process

1. CPM allows for individuals to suspend their process for up to 3 years if an individual, due to life circumstances feels the need to suspend the process, but would like to come back to it in the future. CPM requires a written request be sent to the liaison, the Presbytery office and the Session and will take effect after CPM has taken action on the request.
2. Individuals exercising this option will continue to remain in annual contact either face to face or via email with the CPM. Should an individual fail to make regular contact with the CPM, the committee will assume that you would like to be removed from the process and will begin to take appropriate action.

7.03 – Reinstatement to Process

1. Should a person who has previously withdrawn from the ordination process make a request to reinstate their process, that request shall normally be granted with the following conditions taken into consideration:
 - *All previous academic work while in the Presbyterian Church (USA) care process shall ordinarily be accepted.*
 - *All recent Presbyterian Church (USA) ordination exam results shall be accepted.*
 - *Previously approved internship hours while under care of San Francisco Presbytery may be accepted but a review shall be done by the CPM to determine how recent the internship hours are and their relevance to current ministry needs.*
 - *The person may ordinarily be reinstated to the process at the stage at which he or she withdrew (Inquirer or Candidacy) but the time requirement of that stage of the process will be restarted.*
 - *There may be additional requirements after further review.*

Requests should be sent to the presbytery office once the individual has met with their Session and received their endorsement. CPM will review the request at their next regular meeting.

Chapter 8 – **RECEIVING A CALL**

Once a candidate has been certified “ready for examination for ordination, pending a call,” he or she is able to receive and accept a call to a validated ministry.

When a call has been extended to a candidate, the responsibility for ecclesiastical action switches from the CPM to the Committee on Ministry (COM) of the presbytery of call. The candidate is advised to work closely and carefully with the Pastor Nominating Committee (PNC) of the church of call and the presbytery of call regarding plans for examination, ordination, and installation. Note these plans must be approved by the Presbytery prior to the service taking place.

If the presbytery of call is San Francisco or if the candidate wishes to be examined and ordained in San Francisco, please be in touch with the Presbytery office as soon as possible regarding required packet materials and plans for ordination. *Note: ordination services can happen only after Presbytery has approved your commission and your service must be scheduled at least 10 days after Presbytery approval.*

8.01 Disposition of the File

All original files will be kept indefinitely by the Presbytery.

Chapter 9 – *Appendices*

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Form 5A	<i>Application to be Enrolled by Presbytery as a Candidate</i>
Form 5B	<i>Session Evaluation and Recommendation</i>

GENERAL CPM INFORMATION

1. Meeting Schedule

- a. The CPM generally meets the 1st Wednesday of every month (except July and August).
- b. Presbytery usually meets 5 times a year. The Presbytery web site, www.presbyteryofsf.org, lists the dates and locations for scheduled meetings.

2. Contact Information for the Presbytery

The Presbytery of San Francisco
 2029 University Avenue, Suite #200, Berkeley, CA 94704
 (510) 849-4393
 Fax – (510) 849-4398
www.presbyteryofsf.org

Erika Glisson, Administrative Coordinator
 (510) 849-4393, ext. 301
eglisson@sfpby.org

Rev. Dr. Jeff Hutcheson, Pastor to the Presbytery for Mission & Vision
 (510) 849-4393, ext. 303
jhutcheson@sfpby.org

Rev. Katherine J. Runyeon, Stated Clerk
 (510) 849-4393, ext. 310
krunyeon@sfpby.org

3. Key Web Addresses

- a. PC(USA) Home Page – www.pcusa.org
- b. PC(USA) Preparation for Ministry – www.pcusa.org/prep4min
- c. PC(USA) Bible Content and Ordination Exams – www.pcusa.org/exams
- d. PC(USA) Church Leadership Connection (PIF Forms) – www.pcusa.org/clc/forms.htm
- e. PC(USA) Getting Into Shape Fiscally – www.pensions.org (under educational resources/Financial & Retirement Planning/Seminars)
- f. The Association for Clinical Pastoral Education (CPE) – <http://www.acpe.edu>
- g. Kyros Ministry (“Maintaining Professional Boundaries” – N. California) - <http://www.kyros.org>
- h. Bible Content practice exams – www.whitneyhq.com/biblecontent/

4. Accredited Psychological Assessment Center

Interfaith Counseling Center, Inc.
 Rev. Dr. Scott Sullender, PhD
 15 Austin Ave., San Anselmo, CA 94960
 (415) 256-9701
www.interfaithcc.org
ssullend@gmail.com or ssullender@sfts.edu

Other centers accredited by the Ministry Development Council can be located at www.ministrydevelopment.org.

CPM POLICIES

1. Extraordinary Circumstances

The CPM follows the procedures and policies outlined in G-2.0610 that covers exceptions and waivers for mandated educational, examination, and time requirements.

2. Financial Assistance

Students are encouraged to look for all possible sources for financial aid to support their theological education and preparation in the ordination process. Those sources include their theological institution, session and congregation; and outside loans, scholarships, and grants.

The Presbytery of San Francisco is not able at this time to provide significant financial assistance. However, emergency funds may be available for special needs, not to exceed a total of \$1,250 during the time under care. Inquirers and candidates may apply to the CPM for small grants through their liaison. A complete explanation of the need and of the individual's financial situation will be required for committee consideration. See Appendix 3 for the necessary information for submission. Due to the limits of the purpose and scope of the fund, not all requests will be granted.

3. Confidentiality -

a. Values

1. Confidentiality is held by the CPM as a whole and not by its members individually. Therefore, CPM liaisons cannot offer confidentiality in conversations with inquirers and candidates that would shield critical information from the CPM.
2. If a minister member of CPM has a prior or current pastoral relationship with an inquirer or candidate (e.g. he or she is a member of their congregation), then confidential information held by that pastor shall be protected and the minister member of CPM shall recuse him/herself when appropriate.

b. Types of Information and limits of confidentiality

1. Information in the Public Domain

- a. The names of persons under care are readily disclosed if requested.
- b. All information about the CPM process and procedures is available upon request.
- c. The schedule of CPM meetings is published.

2. "Need to Know" information

a. Information disclosed to the Presbytery

1. Action Items of the CPM.
2. Rationale for motions to endorse, remove, transfer someone in the process which may include relevant background information, Statement of Faith, statement of departure, summary of evaluations, correspondence, etc.
3. Psychological assessments shall not be made available to the Presbytery without prior written consent of the inquirer or candidate.

b. Information Discussed with the Pastor and Elder Advocate

1. The CPM shares the responsibility of the care process with the congregation who endorses the individual.
2. CPM members, the pastor and the elder advocates share impressions, affirmations, concerns and information about the individual with one another in order to work prayerfully, effectively and compassionately with the individual.

c. Information Discussed with References, Supervisors, and Theological Institution Staff

1. The individual signs an Applicant's Statement (Form 1A – *Application to be Enrolled by Presbytery as an Inquirer*) that permits the CPM to contact anyone involved in the preparation for ordination process of the individual.
2. When contacted by the CPM, references, supervisors, and theological institution staff will be asked to share assessments, evaluations, impressions,

- affirmation, concerns, and information about the individual with the CPM.
- d. Information Discussed with other Presbyteries
 1. When applying for a call, an official from the potential presbytery of call will contact the Presbytery of San Francisco for an in-depth reference.
 2. The CPM liaison will provide relevant information on the candidate including any aspect of the candidates' relation with the CPM, experience, preparation and training for ministry, and aptitude and motivation. These conversations are privileged conversations and confidentiality will be maintained with regard to any specific information given.
 3. If a departure has been declared by either the CPM or the candidate when certified ready for examination, this shall be communicated to the potential presbytery of call.
 - e. Information Related for Judicial Review
 1. In compliance with the Book of Order, all materials of the CPM, including confidential minutes and assessments, may be requested by and shared with the Judicial Commission upon notification to the CPM Moderator and the Stated Clerk of the Presbytery.
 2. Confidential information of the CPM is held in strictest confidence by those involved in the Judicial Review process and will not be publically distributed.
3. Confidential Information
 - a. The records, including the detailed minutes of the CPM belong to CPM and are intended for committee use only. In the event of an administrative review or judicial process, information may be made available under seal and treated with the upmost confidential care.
 - b. Psychological assessments are the confidential property of the CPM and shall not be distributed without the prior written consent of the individual. Copies shall remain only with the liaison and in the office file.
 4. CPM File on the Individual
 - a. The contents of the file are intended for the sole use of the CPM in its assessment of an individual's personal and professional preparation for ministry. This includes all materials submitted to the CPM as part of the preparation process.
 - b. As the sole property of the presbytery, the complete file will not be made available to the individual, the sponsoring church, calling presbytery or the public-at-large.
 - c. Portions of the files pertinent to the calling Presbytery will be released with the written permission of the candidate and the CPM, see CPM Form F, File Release Form.

4. Procedures Related to Departures

a. Liaison Transparency with Sub-Group and the CPM

1. It is the expectation that the CPM liaison will use wisdom in balancing the trust given them by the inquirers and candidates with the responsibility they have to the CPM for appropriate disclosure of theological, psychological, spiritual, and behavioral departures/concerns.
2. The CPM is expected to hold such disclosures with care and absolute confidentiality.
3. Departures need to be addressed sensitively but directly with inquirers and candidates.

b. Departures - How are they handled?

1. When departures surface by way of conversations with a liaison, other CPM members, a blog, an annual, candidacy or final, etc. - it is expected that
 - a. The departure shall be disclosed to the sub-group, the appropriate committee (Exec. Committee, internship/CPE Requirements, Ed. Committee, etc.), and possibly the entire CPM for prayerful consultation. Consultation may include the Stated Clerk, the Executive Presbyter, Presbytery lawyers, and appropriate people on the national staff.
 - b. The departure shall be addressed directly with the inquirer/candidate.
 - c. The departure shall be captured in confidential minutes of the CPM.
 - d. The departure shall be addressed in the covenant and recorded in the minutes.

2. Disclosure to the Presbytery
 - a. The CPM may disclose a departure if the person is being removed from the process and the departure is part of the reason for removal. The decision to disclose a departure will be the prerogative of the Executive Committee of the CPM in consultation with the entire CPM. For example, it may not be appropriate to state publicly that a person is being removed for issues related to addiction if other reasons exist to warrant the removal of a candidate, but it may be warranted if the departure is related to a non-Reformed understanding of Christology.
 - b. When the CPM certifies someone ready for examination for ordination with a departure, the specific departure shall be noted in the motion to the Presbytery. The entity identifying the departure shall submit in writing the rationale for the departure to the CPM for distribution to the Presbytery. Such motions are to be presented as a report of the CPM and not placed on the omnibus motion.
3. The CPM (often through the sub-groups) is responsible for discerning whether or not a particular departure warrants removing someone from the process.

c. Bringing Controversial Issues to the Entire CPM - when departures are involved

1. Much of our process (interviews, covenants) is handled by the sub-groups while other aspects of our process are handled by the entire CPM (advanced approvals).
2. Sometimes when the issues or departures are confounding to the sub-group (e.g., poor feedback on a CPE evaluation, mental health issues, etc.), the sub-group may consult with particular committees of the CPM, staff, and the entire CPM in determining next steps.
3. When the departures or issues are perceived to be problematic/controversial (e.g. issues involving dispute about essential tenets – theological or behavioral), the sub-group should seek the wisdom of the entire CPM. In these cases, the CPM may consult and advise the sub-group on how to address the issue in the covenant, whether to advance or remove a person from the process, or may elect a task force to study any questions and/or the implications of this departure.
4. The sub-group may also ask that the annual, candidacy or final interview take place before the entire CPM. It is anticipated that this request will be honored by the CPM.
5. If an inquirer or candidate so requests, an appeal of a sub-committee decision can be made to the next plenary meeting of CPM. Such an opportunity is respectful of the congregation and session whose endorsement brought the individual to CPM.

d. Motions that should be considered following any inquiry, candidacy, and annuals

1. Enter/continue person in the process with the covenant indicating the issues and how they will be addressed in the five growth areas.
2. Advance person to next level with the covenant indicating the issues and how they will be addressed in the five growth areas.
3. Remove the person from the process.

e. Motions that should be considered following the final interview

1. Certify ready for examination
2. Certify ready for examination with a departure indicated.
3. Continue in process with the covenant indicating the issues and how they will be addressed in the five growth areas.
4. Remove the person from the process.

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@sfby.org) and your liaison. Requests must be received at least 2 weeks before the scheduled CPM meeting and must be endorsed by your group (except accredited CPE programs) prior to full committee approval.

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 (not necessarily required)/week x 10 weeks = 400 hours)
- d. Start and completion dates of the program.
- 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. Start and completion dates of the Internship
- 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 or approximately 54 units equivalent)

- 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. Completed two years of seminary or the equivalent

6. To Enter into Formal Negotiations with a Church

- a. Must be within six months of completing seminary
- b. Completed an annual consultation with CPM within the last year
- c. Date of successful completion of Bible Content and ORDS exams or
- d. Found certified ready for examination

7. 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

8. 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 round-trip tickets per year.

9. Financial Assistance (not reimbursement for travel expenses or Psychological 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. Financial Assistance 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 2 weeks 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 ½ of the 800 hours or 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.

EDUCATION REQUIREMENTS OF THE PRESBYTERY OF SAN FRANCISCO

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

1. **BIBLICAL STUDIES:** Old and New Testaments, 2 classes in each testament. Classes must cover the Pentateuch, Gospels, and writings of Paul
Semester: 4 classes (3 units each) = 12 semester units OR Quarter: 4 classes (4 units each) = 16 quarter units

2. **LANGUAGE AND EXEGESIS:**

Hebrew and Greek – One year each of Hebrew and Greek language

Semester: 4 classes (3 units each) = 12 semester units OR Quarter: 5 classes (4 units each) = 12 units of Greek + 8 units of Hebrew for a total of 20 quarter units

Exegesis: One class in exegetical method and two additional classes that require the application of the exegetical method in each language

Semester: 3 classes (3 units each) = 9 semester units OR Quarter: 3 classes (4 units each = 12 quarter units)

Note. If exegesis paper required, a biblical studies or exegetical method class may “double count” for the exegetical application class. Course syllabus and a copy of the exegesis paper may be required to establish that a particular class meets the criteria.

3. **SYSTEMATIC THEOLOGY:** Must reflect a Reformed perspective and include nature of God, revelation-scripture, theological anthropology, Christology, salvation-atonement, Holy Spirit, church, mission, sacraments, and eschatology
Semester: 2 classes (3 units each) = 6 semester units OR Quarter: 3 classes (4 units each) = 12 quarter units

4. **CHURCH HISTORY:** Covers church history (ancient church to present), including the Reformation
Semester: 2 classes (3 units each) = 6 semester units OR Quarter: 3 classes (4 units each) = 12 quarter units

5. **PRACTICAL THEOLOGY:**

Semester: 5 classes (3 units each = 15 semester units OR Quarter: 5 classes (4 units each) = 20 quarter units

- Homiletics/Preaching – Required
- Pastoral Care and Counseling – Required
- Spiritual Formation –Required in class format to gain group experience; individual spiritual direction does not meet the requirement (1 unit or more)
- Choose 2 Practical Theology Electives from the following subject areas: Ethics, Christian Education, Mission, Evangelism, Leadership, and Administration. These 2 classes must be from distinctively different subject areas (e.g. 1 course in Mission and 1 course in Ethics)

6. **PRESBYTERIAN COURSES:**

1 class in each area, semester or quarter, for a total of 3 classes. Units may vary.

- Reformed Worship & Sacraments
- Presbyterian Polity

- Book of Confessions *(If a systematic theology, historic theology, or polity class covers the Confessions, it may “double count” for the Book of Confessions class. The course syllabus will be required to establish that the class meets the criteria.)*
- CPM Education Sub-Committee and the CPM must approve in advance all Alternative Education Plans.
- The CPM values face-to-face and contextual learning. Distance/on-line learning classes and substitutions require pre-approval.
- Required classes must be taken for credit and grade (unless the course is exclusively pass/fail). Neither pass/fail nor auditing is allowed.
- If not attending a PC(USA) theological institution, discuss with your CPM liaison and sub-group your educational plans for completing systematic theology (must be from a Reformed perspective) and the Presbyterian courses. You may incur additional expenses in order to complete these classes at a Presbyterian theological institution.

WHAT THEOLOGICAL INSTITUTION SHOULD I ATTEND

1. CPM Recommendations in Choosing a Theological Institution
 - Avoid casual choice based upon convenience of location and “word of mouth” reputation.
 - Consider carefully recommendations from youth workers and pastors, particularly those who have significant ministry experience in the PC(USA)
 - Check out the web sites for various seminaries and evaluate curricula issues, reputation of professors, field education requirements, theological perspective, diversity of student body and faculty, and the features of the community where each theological institution is located.
 - Visit two or more schools including PC(USA) seminaries. Make appointments with faculty, students, and other staff to explore the unique point of view for each school. Check out the community life and living accommodations. Learn about financial scholarship and aid programs. Consider resources for spiritual, psychological, and social support. Check out local church opportunities where you might worship and serve.
 - Tabulate the comparative cost for tuition and living expenses for each theological institution. Consider the financial and social impact of time and distance from your home church, family, friends, and the CPM.
 - Consult and pray with friends, family members, and spiritual mentors about your preferences. Listen for God’s leading.
2. PC(USA) Seminaries
 - Austin Presbyterian Theological Seminary – www.austinseminary.edu
 - Columbia Theological Seminary – www.ctsnet.edu
 - University of Dubuque Theological Seminary – udts.dbq.edu
 - Louisville Presbyterian Theological Seminary – www.lpts.edu
 - McCormick Theological Seminary – www.mccormick.edu
 - Pittsburgh Theological Seminary – www.pts.edu
 - Princeton Theological Seminary – www.ptsem.edu
 - San Francisco Theological Seminary – www.sfts.edu
 - Johnson C. Smith Theological Seminary – www.itc.edu/pages/smith.asp
 - Union Theological Seminary and Presbyterian School of Christian Education – www.union-psce.edu
3. Other Seminaries with large numbers of Presbyterian Students
 - Fuller Theological Seminary (including Fuller Northern California) – www.fuller.edu

SERMON REQUIREMENT FOR THE FINAL ASSESSMENT

Requirements:

Written submissions are due one month in advance of the Final Assessment. Distribution includes the CPM group conducting the assessment and the Sermon Sub-Committee of the CPM.

Two components to the requirement

1. A written version of the sermon (typed, double spaced)
2. 15-minute oral delivery of the sermon presented at the Final Assessment

The CPM assumes that this sermon will be supported by thorough exegetical work. Therefore, the sub-group may ask questions regarding the exegetical composition of this sermon.

SERMON PREPARATION – QUESTIONS TO CONSIDER

1. Who is the “**audience?**”
(If your “audience” is the CPM, then you are speaking to a diverse group of elders and ministers of all ages, who reside in urban and suburban settings. What they have in common, beside their love of Christ, is a desire to support and guide the candidacy of an equally diverse group of theological students preparing for ordination in the PC(USA)).
2. What is the **purpose** for this sermon?
3. How can I bring the **text alive** for these 21st century ears and hearts?

TRANSFER TO ANOTHER PRESBYTERY²⁵

1. For those who have been “certified ready for examination” for over three years and who live out of the area, it is recommended that they transfer the covenant relationship to the Presbytery where they are now residing.
2. There may be other circumstances when it is appropriate for an inquirer or candidate to transfer the covenant relationship from the Presbytery of San Francisco to another presbytery.
 - a. The person under care discusses the transfer fully with his or her current CPM liaison. When it is clear that the transfer would be in the best interest of the person, that the current session of care understands and agrees with the rationale for the transfer, and that the current CPM would likely approve the transfer, the inquirer or candidate and the liaison reach an informal agreement to proceed with the process.
 - b. The person under care discusses the transfer of membership with the particular session of the new congregation including the reasons for the transfer. Should this particular congregation express a willingness to receive this person as a member and take him or her under care for the duration of the process for preparation for ordination, then the session sends the receiving CPM an informal letter expressing this.
 - c. The person under care discusses the transfer with the CPM and staff of the receiving Presbytery including the reasons for the transfer, the informal approval of the Presbytery of San Francisco, and the willingness of the new congregation to receive this person into membership and take him or her under care.
 - (1) The receiving CPM will outline its requirements for ordination with the individual.
 - (2) The receiving CPM will also consult with the CPM of the Presbytery of San Francisco to identify the current covenant, any outstanding requirements, and any issues of concern and pastoral care
 - d. The receiving Presbytery formally requests a transfer from the Presbytery of San Francisco.
 - e. The Presbytery of San Francisco transfers the covenant relationship to the new presbytery and sends:
 - (1) A certificate attesting the approval
 - (2) The reasons for the request for transfer
 - (3) A copy of the individual’s file. The original file is retained by the Presbytery of San Francisco
 - f. The receiving presbytery formally approves transfer of care from the Presbytery of San Francisco, and approves the transfer of membership and care to the receiving congregation.
 - g. The new congregation brings the individual into membership and under care of its session.

TRANSFER TO ANOTHER SESSION WITHIN THE PRESBYTERY

1. The person under care discusses benefits and drawbacks of the transfer fully with the CPM liaison.
2. The liaison consults with the current pastor and session with regard to the inquirer/candidate's status in the preparation for ordination process, the covenant, and any concerns and issues for pastoral care.
3. The liaison consults with the receiving pastor and session and discloses the inquirer/candidate's status in the preparation for ordination process, the covenant, and any concerns and issues for pastoral care.
4. If all parties agree that the transfer is in the best interest of the inquirer/candidate, the next steps shall be taken. If no agreement is reached, then the inquirer/candidate remains with the current session and church.
5. The current session submits a formal report to the receiving session stating the inquirer/candidate's status, the current covenant, and any oversight concerns.

²⁵ G-2.0608

6. The receiving session shall send a letter to the CPM stating they are willing to accept the inquirer/candidate into membership, to take the person under care, and to request that the CPM approve the transfer of membership.
7. The CPM approves the transfer and informs both sessions of its action.
8. The receiving session accepts the individual into membership and under care. The session assigns the inquirer/candidate an elder and pastor advocate.
9. After this transfer, a six-month relationship-building period ensues. This gives the congregation, session, and individual under care the necessary time to develop and deepen their relationship
 - a. After six months, the session shall determine if it wishes to continue the covenant relationship and reports this decision to the CPM.
 - b. The inquirer/candidate cannot advance in the ordination process until this six-month period is completed and the session affirms its intent to continue the covenant relationship.

WITHDRAWAL OR REMOVAL FROM THE PREPARATION FOR ORDINATION PROCESS

1. There may be circumstances where it is appropriate for an inquirer or candidate to withdraw from the preparation for ordination process.
 - a. The person should consult with the session and the CPM before withdrawing from the covenant relationship
 - b. Requests to withdraw shall be submitted in writing to the Presbytery.
 - c. The request to withdraw will be placed on the omnibus motion for approval by the Presbytery.
2. There may be circumstances where it is appropriate for the Presbytery to remove an inquirer or candidate from the preparation for ordination process.
 - a. The CPM shall make every effort to contact the inquirer or candidate and explain the rationale behind the decision to remove the person from the process. The CPM shall allow any interested parties, including the individual, a chance to address their concerns to the CPM prior to making their recommendation to the Presbytery.²⁶
 - b. The session shall be copied on all correspondence involving information, deadlines, and actions about removal of the inquirer or candidate from the process.
 - c. The Presbytery shall be presented with a summary of the reasons for removal before it takes its final action.
 - d. Once the individual has been removed from the process, notifications shall be made to the person, the session, and if appropriate, the theological institution.²⁷

²⁶ G-2.0609

²⁷ G-2.0609

CPM FORM A – PSYCHOLOGICAL ASSESSMENT RELEASE FORM

As part of the application process to become an inquirer in the Presbytery of San Francisco, all individuals are required to participate in a comprehensive, in-depth psychological and career assessment conducted by an accredited testing site. The assessment is conducted by credentialed professionals, (i.e. licensed psychologists) who are trained in psychological testing and understand the professional and personal implications of ordination to the ministry of the Word and Sacrament. Both the CPM and the applicant make use of the assessment to identify and evaluate areas of strength and growth as together they explore the call to ministry. Such assessment may provide background and goals for the covenant agreement developed between those under care and the CPM.

The CPM treats these assessments with the same care it does for all individuals in the preparation for ordination process. Outcomes and recommendations are fully discussed with the individual coming under care so that mutual understanding can emerge. Tests do not give the whole picture of a person but may be helpful in the assessment of appropriate temperament for ministry, communication, and conflict resolution aptitude, family of origin issues, and overall psychosocial health.

The assessment is the confidential property of the CPM and the original will be kept in the permanent file of the person under care. Copies of the assessment are distributed to the Psychological Assessment Sub-Committee, the CPM chair, and all members of the CPM sub-group to which the person has been assigned. Once the assessments have been processed, copies are shredded to maintain the highest standards of discretion and confidentiality.

Copies of the psychological assessment may be released to other presbyteries with the written permission of the individual. Such requests are often made when the individual is being considered for ordination or when a transfer to another presbytery has been requested.

I hereby authorize the release and disclosure of all information, both written and verbal, related to the psychological assessment including but not limited to test data and results, findings, reports, recommendations, and professional opinions to the Committee on Preparation for Ministry (CPM) of the Presbytery of San Francisco.

I understand that this information and the assessment report will be limited to the CPM and treated as confidential by said Committee. This report will not be released to any other entity/person in or outside the Presbyterian Church without my additional written authorization.

Signed: _____

Print Name: _____

Witness: _____

Print Name: _____

Date: _____

I attest that I have been endorsed (or will be endorsed) by my session to proceed with this Psychological Assessment and request that billing be split 3 ways: San Francisco Presbytery, myself & my church.

Applicant Signature

Send signed original to:

Attn: CPM

The Presbytery of San Francisco, 2029 University Avenue, Suite #200, Berkeley, CA 94704

CPM FORM B – SEXUAL MISCONDUCT SELF-CERTIFICATION

The following information related to sexual misconduct was mandated by the Sexual Misconduct Policy and Its Procedures adopted by the 203rd General Assembly(1991), and was revised by the 205th General Assembly (1993).

Please check one of the following:

- I certify below that no civil, criminal, ecclesiastical complaint has ever been sustained²⁸ or is pending²⁹ against me for sexual misconduct; and I have never resigned or been terminated from a position for reasons related to sexual misconduct.
- I am unable to make the above certification. I offer instead, the attached description of the complaint, termination, or the outcome of the situation with explanatory comments. Please enclose attachment explaining the reasons.

Please check all statements below

- I attest that the information contained in my application papers to become an inquirer is accurate to the best of my knowledge and may be verified by the Presbytery of San Francisco.
- I hereby authorize the Presbytery of San Francisco to inquire concerning any civil or criminal records, or any judicial case or proceeding involving me as a defendant, related to sexual misconduct. By means of this release I also authorize any previous employer, and any law enforcement agencies or judicial authorities or ecclesiastical governing bodies to release any and all requested relevant information related to sexual misconduct to the Presbytery of San Francisco.
- I have read this certification and release form and fully understand that the information obtained may be used to deny me endorsement as an inquirer or candidate in the Presbytery of San Francisco. I will hold harmless the employing or judicial authority or any other entity from any and all claims, liabilities, and causes of action for the legitimate release of any information related to sexual misconduct.

Signed: _____

Print Name: _____

Date _____

Send signed original to:
 Chair of CPM
 The Presbytery of San Francisco
 2029 University Avenue, Suite #200
 Berkeley, CA 94704
 (510) 849-4393

²⁸ In a criminal court, "sustained" means that there has been a guilty plea, a guilty verdict, or a plea bargain. In a civil court, "sustained" means that there has been a judgment against the defendant. In an ecclesiastical case, "sustained" means that there has been a guilty plea and censure imposed, or finding of guilty with censure imposed, or an Alternative Form of Resolution Agreement approved by a permanent judicial commission in the Presbyterian Church (USA) or an equivalent body of another church.

²⁹ In a criminal court, "pending" means a criminal charge before a grand jury, in the process of being prosecuted, or in a case that there is not yet a verdict. In a civil court, "pending" means a case in which there has not been a decision or judgment. In an ecclesiastical case, "pending" means an investigating committee is inquiring into an allegation or charges have been filed but have not been decided by a permanent judicial commission; or an allegation or charges are in an equivalent state or process in a church other than the PC (USA).

CPM FORM C

RECEIPT OF THE DOCUMENTS:

STANDARDS OF ETHICAL CONDUCT

AND

THE SEXUAL MISCONDUCT POLICY AND PROCEDURES
OF THE PRESBYTERY OF SAN FRANCISCO

I hereby acknowledge that I have received, read and understand the meaning and agree to conduct myself in accordance with the following policies:

- The Standards of Ethical Conduct, approved by the 210th General Assembly (1998) of the Presbyterian Church (U.S.A.), and
- The Sexual Misconduct Prevention Policy and Procedures of the Presbytery of San Francisco adopted November 17, 2007.

Signed: _____

Print Name: _____

Date _____

Send signed original to:
Chair of CPM
The Presbytery of San Francisco
2029 University Avenue, Suite #200
Berkeley, CA 94704
(510) 849-4393

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 each) = 12 semester units OR Quarter: 4 classes (4 units each) = 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 an exegesis paper is required, a biblical studies or exegetical method class may “double count” for exegetical application requirement.</i>					
Semester: 7 classes (3 units each) = 21 semester units OR Quarter: 8 classes (4 units each) = 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 each) = 6 semester units OR Quarter: 3 classes (4 units each) = 12 quarter units					
CHURCH HISTORY: <i>Covers church history (ancient church to present) including the Reformation</i>					
Semester: 2 classes (3 units each)=6 total semester units OR Quarter: 3 classes (4 units each)=12 total quarter units					
PRACTICAL THEOLOGY:					
Semester: 5 classes (3 units each)=15 semester units OR Quarter: 5 classes (4 units each)=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, and Administration. These 2 classes must be from distinctively different subject areas (e.g. Mission and Ethics)
- ~ The CPM Education Sub-Committee and the CPM must approve in advance all Alternative Education Plans.
- ~ Required classes must be taken for credit. Auditing is not allowed.
- ~ **SEE SEPARATE FORM FOR FULL DETAILS OF INFORMATION**

CRIMINAL BACKGROUND CHECK FORM

In connection with my application to enter the care process or to serve as a volunteer with **The Presbytery of San Francisco** (“Client”), I understand that a “consumer report” and/or “investigative consumer report”, as defined by the Fair Credit Reporting Act, will be requested by Client for the purposes of coming under care of the Committee on Preparation for Ministry, from Protect My Ministry, Inc., (“Protect My Ministry”), a consumer reporting agency as defined by the Fair Credit Reporting Act. These reports may include information as to my character, general reputation, personal characteristics or mode of living, whichever are applicable. They may involve interviews with sources such as my neighbors, friends or associates. The report may also contain information about me relating to my criminal history, social security number verification, verification of education or employment history or other background checks. Such reports may be obtained at any time after receipt of this Disclosure and Authorization and if I enter into a covenant relationship, throughout the course of my being under care, as permitted by law and unless revoked by me in writing. I understand that I have the right, upon written request made within a reasonable amount time after the receipt of this notice, to request disclosure of the nature and scope of any investigative consumer report to Protect My Ministry, Inc., 14499 N. Dale Mabry Hwy., Suite 201 South, Tampa, FL 33618 or 1-800-319-5581. For information about Protect My Ministry’s privacy practices, see www.protectmyministry.com.

Acknowledgement and Authorization

By signing below, I voluntarily and knowingly authorize Client or its authorized agents to obtain or prepare consumer reports or investigative consumer reports about me. I acknowledge receipt of a copy of *A Summary of Your Rights under the Fair Credit Reporting Act* and certify that I have read this Disclosure and Authorization as well as the summary explaining my rights under the Fair Credit Reporting Act.

Residents of Minnesota and Oklahoma only:

Under state law you have a right to receive a copy of your consumer report, free of charge, if one is required by Client. By checking the below box, a copy will be provided to you at the address you provide on this Disclosure and Authorization.

- I wish to receive a copy of any consumer report on me that is requested.

Residents of New York only:

Under state law you have the right to inspect and receive a copy of any investigative consumer report requested by Client by contacting Protect My Ministry directly. You also acknowledge receipt of a copy of Article 23-A of the New York Correction Law by checking the below box.

- I acknowledge receipt of a copy of Article 23-A of the New York Correction Law.

Residents of Washington State only:

Under state law you have a right to request a copy of the Washington Fair Credit Reporting Act's disclosure to consumers (RCW 19.182.070) and a copy of your report by contacting Protect My Ministry directly.

Residents of California and Maine only:

Under state law you have a right to receive a copy of your investigative consumer report and/or consumer credit report, free of charge, if one is requested by Client. By checking the box below a copy of your report will be provided to you at the address you provide on this Disclosure and Authorization.

I wish to receive a copy of any report on me that is requested.

Signature TODAY'S DATE _____

LAST NAME _____ FIRST NAME _____ MIDDLE NAME/INITIAL _____

HOME ADDRESS _____

CITY _____ COUNTY _____ STATE _____ ZIP _____

____ - ____ - ____ _____ _____
SSN D/L or STATE ID STATE ISSUED

EMAIL ADDRESS

For identification purposes only, please provide FULL DOB: _____

Please List Other Names Used _____

Protect My Ministry, Inc.
14499 Dale Mabry Hwy, Ste 201 South
Tampa, FL 33618
Phone: 800-319-5581 Fax: 800-319-5582
www.protectmyministry.com

CPM FORM F – CPM FILE RELEASE FORM

The Presbytery of San Francisco has received a request to provide information or release of your file to another Presbytery/denomination. This happens when a presbytery or another denomination is considering you as a candidate for a ministry position or when a formal transfer of care has been initiated. It is usually customary to send copies of all paperwork mandated by the PC(USA) to the requesting Presbytery. Please note that the Presbytery of San Francisco keeps your original file indefinitely.

As you know, The Presbytery of San Francisco's requirements exceed those mandated by the Book of Order. Therefore, the Presbytery or denomination asking for information or requesting your file may not receive some of the written reports and evaluations for these extra requirements without your written permission. It is recommended but not required that a copy of the full file be released. You have the option to release the information and enclose a response to these evaluations and assessments.

Please check the appropriate box and fill in the name of the presbytery/ordaining body for each item. Each presbytery/ordaining body making the request may require a separate signed form.

1. Psychological Assessment

- a. I release these evaluations to _____ Presbytery or ordaining body.
- b. I release these evaluations to _____ Presbytery or ordaining body and am attaching a written response to this evaluation.
- c. I decline to release these evaluations to _____ Presbytery or ordaining body.

2. Self and Supervisory Internship/Field Education/Work in the Church Evaluations

- a. I release these evaluations to _____ Presbytery or ordaining body.
- b. I release these evaluations to _____ Presbytery or ordaining body and am attaching a written response to this evaluation.
- c. I decline to release these evaluations to _____ Presbytery or ordaining body.

3. Self and Supervisory Clinical Pastoral Education Evaluation

- a. I release these evaluations to _____ Presbytery or ordaining body.
- b. I release these evaluations to _____ Presbytery or ordaining body and am attaching a written response to this evaluation.
- c. I decline to release these evaluations to _____ Presbytery or ordaining body.

4. Other documents pertaining to my fitness for ministry

- a. I release these documents to _____ Presbytery or ordaining body.
- b. I release these documents to _____ Presbytery or ordaining body and am attaching a written response to these documents.
- c. I decline to release these documents to _____ Presbytery or ordaining body.

Please note that it is required that potential presbyteries of call do thorough background checks. By its nature, a reference check is a full and candid reflection of the CPM's relationship with the person under care, asserting accomplishments, talents and growth, and acknowledging areas for further discernment and development. Topics may include anything required by the CPM, paperwork, covenants, conversations, assessments, and evaluations including those listed above. While you may decline to have the written material released, the content of those materials may be shared with an official from the potential presbytery of call without your written authorization.

Signed: _____

Print Name: _____

Date _____