



The Society of the Holy Trinity

A collaboration of Anglican New Monastic Communities

POLICY TWO

Discernment Standards & Processes for Appointment
of Participants to Residential Communities

The Society of the Holy Trinity

POLICY TWO CONTENTS



1. Introduction
2. Beginning the Discernment Process
3. Forming a Role Description
 - 3.1 Clarity around the Role regarding expected activity
 - 3.2 Clarity around expected competencies and knowledge
 - 3.3 Importance of training opportunities to address any gaps between expected competencies and actual competencies
 - 3.4 Expectations around external Spiritual Director and ~~if needed~~ Therapist if needed
 - 3.5 DBS Expectations
- 4 Application Form
- 5 Adverts
 - 5.1 Social Media
 - 5.2 Print Media
 - 5.3 Local Media
 - 5.4 Flyers & Conferences
 - 5.5 Lay Pioneer Training Courses
- 6 Discernment Processes – Interviews
 - 6.1 Involvement of Community members
 - 6.2 Useful skills to include in interview panel & external people
 - 6.3 Sample questions & possible interview scenario group processes or tasks
 - 6.4 Scoring Processes
- 7 Discernment Processes – Short Stays
 - 7.1 Initial Short Stay
 - 7.2 Longer Extended Stay
 - 7.3 Combined Stay if more than one person is entering residential setting
- 8 Discernment Processes – Written References
 - 8.1 Four Forms of Recommended Written References
 - 8.2 The challenge of mixed picture from Written References & Recommendations
- 9 Discernment Processes – Involvement of Archdeacon and/or Bishop
- 10 Letters of Offer & Initial Guidance
- 11 Beginnings
 - 11.1 Probationary Residential Periods
 - 11.2 Signing of Contracts and key clauses
 - 11.3 Signed statement pertaining to Discipline Policy and Code of Conduct
 - 11.4 Residential members and Spaces of Belonging of the Society
 - 11.5 Essentials for Communication and House Meetings

1.0 Introduction

Getting the process of discernment correct for new potential participants in the residential community is key to the health and growth of the missional community. Get it wrong, and there can be serious consequences. It is advised that the community prepare for this by drawing on Policy One. This policy seeks to set best standards regarding the discernment processes around seeking and appointing new residential members of the residential community. It is advised that the process be a mixture of interview and lived experience whilst at the same time managing any potential risks to participants of the residential or dispersed community.

2.0 Beginning the Discernment Process

It is suggested that the following discernment process be followed:

- Preparation time for the Community
- Form discernment panel
- Placing of Advert
- Send Application, Role Description, explanation of Process
- Initial Telephone Conversation
- Send Reference request forms (4) and completion of Confidential Declaration
- Receive back Confidential Declaration and References and take to the discernment panel to check if appropriate to invite for Interview and Short Stay
- Complete Interviews and Short Stay, discernment panel to make a decision whether to proceed, and then to begin DBS.
- DBS to be received before beginning process for Longer Stay
- Discernment panel to meet to make a final decision whether to offer subject to one month and three months' probation. Candidate told of outcome.
- Meeting with Archdeacon or Suffragan Bishop
- Final Panel meeting and decisions

3.0 Forming a Role Description

A role description should be a collective summary concerning the role, authorised activity and the expected competencies and knowledge in the performance of such a role.

3.1 Clarity around the Role regarding expected activity

The Role Description should begin with clarity about expected activity related to the role. It is important to consider here whether the person will be in part time or full-time employment so as to not set the bar too high.

3.2 Clarity around expected competencies and knowledge

The agreed role and function of the residential member of the community really needs to be clear. As well as a description of tasks and responsibilities, there should be clarity about essential and desirable skills and knowledge. This will in turn clarify the expectations of potential community members. Although this is not a work-related role but a Christian vocation, it is still really important to make things as clear as possible. There is an example of a Role Description in the Appendices.

3.3 Importance of training opportunities to address any gaps between expected competencies and actual competencies

Once you have reviewed the expected competencies around skills and knowledge, and the desirables, consideration needs to be given to what training opportunities will be provided or funded to allow

the individual to gain the skills and knowledge to address the gap between expectations and current reality.

3.4 Expectations around external Spiritual Director and Therapist if needed

It is good to be clear from the start that having an external spiritual director and, if required, an external therapist, are expected and mandatory. It should also be made clear that the costs for both will not be met by the Community or the Parish. It is worth finding out about local resources around Spiritual Director networks if an individual does not have a nearby Spiritual Director.

3.4 DBS Expectations

Protecting our communities is absolutely essential. Safeguarding therefore begins with the individual completing the Confidential Declaration which is included as part of the Application Form. This must be received in advance of any planned stay with the community. An Enhanced full DBS will be required if the candidate gets to the stage of interviews and short stay. A completed DBS report must be received before this longer stay can be organised. This is to ensure that we adequately protect our communities from those we are still discerning and do not know.

4.0 The Application Form

Our application form (see Appendix 4) draws on the good practice of other Anglican Mission Communities. To assist the Discernment Panel, the form includes the questions from the current Church of England Safeguarding Confidential Declaration form. The form seeks to assist the applicant to provide detailed information to assist the panel in their discernment responsibilities.

The application form must be completed in full, and failure to do so can either require resubmission or the ending of the discernment process.

5.0 Adverts

All Adverts need to be clear that this is not work but a vocational opportunity; there must be no confusion about expectations. The best adverts are clear and eye catching.

5.1 Social Media

Facebook is a very good place to put residential community opportunities. There are a number of differing Facebook Groups and Pages including the New Monasticism UK Network, CMS, Church Army, Fresh Expressions and many other opportunities. It is best to create a .pdf or .jpg version of an advert which is easy to convert on an Apple Mac Computer. See the Appendix template for a social media advert.

5.2 Print Media

It is much harder to set a template for print media because requirements vary. For example, the Church Times has a particular costed template that it uses. It is best to work directly wherever the advert is to be placed adapting a template, see Appendix 2. Places to consider Diocesan Newspapers, Church of England Newspaper and the Church Times.

5.3 Local Media

It is worth considering if there are local websites, Newspapers or Magazines which will help you get your opportunity out there.

5.4 Flyers & Conferences

Some of the best places to recruit are at conferences or events associated with Lay Communities, New Monasticism, Religious Communities, Fresh Expressions of Church etc. An example of a flyer is included in Appendix 3.

5.5 Lay Pioneer Training Courses

There are not many Pioneer training courses around the country, but Lay Pioneer training courses and opportunities will develop in time. These have noticeboards and other opportunities for posting information on residential communities. The Church Army and CMS should also be considered.

6.0 Discernment Processes – Interviews

It is recommended that the Discernment Panel have a minimum of three people and a maximum of six. It is envisaged that this discernment will be for a maximum of four residential opportunities. Panel members will need to be involved from the short stay element of the process to the final decision.

6.1 Involvement of Community members

It is good practice for the Community, or PCC if the community does not yet exist, to elect one and possibly two members of the PCC/Community to be involved in the discernment panel. It is important that the Priest in Charge and/or the Leader of the Community/Prior and Sub Prior also be involved in the discernment, and if there is a Dean, for them to be involved also. A process should also seek feedback from members of the community who will encounter the candidate at meals, prayer and shared tasks. See the Discernment Process Panel Form for this process.

6.2 Useful skills to include in interview panel & external people

It would be good to consider inclusion of the following in the Discernment Panel:

- A participant in the Church/PCC/Community locality with a Psycho-therapeutic background who has local reputation for good practice.
- A member of the neighbourhood outside of the Community who is involved in local activities and has a good understanding of the work of the local church.
- Leaders of other residential/new monastic/traditional religious/missional communities.
- Local Diocesan Mission staff including Diocesan Missioner or Fresh Expressions Enabler if appropriate.

6.3 Sample questions & possible interview scenario group processes or tasks

It is important to identify a list of questions and scenario situations that test the level of the applicant's skills and knowledge, and their personal qualities and characteristics. We are suggesting a particular scoring approach to assist in objectivity and to maintain equal opportunities. A sample of possible questions is attached in Appendix 6.

6.4 Scoring Processes

It is suggested that each question and scenario situation be scored out of ten, with space for each of the panel to make notes. It is suggested that each member of the panel scores the questions at the end of interview and not during the interview and does so in private. It is suggested that an average of the final score of the interviews is taken. It is usual practice to expect more than 50% as essential for proceeding, and that if it is less than 40% this would be deemed an indication of not passing this stage of the discernment process.

7.0 Discernment Processes – Short Stays

7.1 Initial Short Stay (Weekend)

It is impossible to make decisions about residential community without including the experience of living with the person in community. Therefore, short stays are really important to give the candidate an opportunity to experience the community, and for the community to experience the applicant. It is suggested that the interview be combined with a short stay say over a weekend for two to three

days. This should include one shared meal, participation in prayer, and participation in some form of group encounter. In this time the applicant is expected to demonstrate some skills and knowledge which include:

- Time management
- Personal hygiene
- Evidence of self-awareness
- Participation in shared tasks
- Listening skills
- Humility, flexibility, openness, turn-taking
- Good verbal communication skills
- Some evidence of self-confidence

7.2 Longer Extended Stay (Week)

The Applicant will be expected to take part in the life of the community, including its prayer, worship, mission and community life over one week. In this period, it is expected that the individual will demonstrate the following:

- Willing to follow the direction of leaders of the community
- Insight into own personal weaknesses
- Depth of faith and spirituality
- Holding lightly onto own opinions
- Ability to negotiate
- Sense of humour
- Maturity of character

7.3 Combined Stay if more than one person is entering residential setting (Week)

This final stay is really important to see how the combination of the new potential residents work when together and with any existing members of the residential community in combination with any existing dispersed community. The compatibility of the various characteristics of those being considered can be assessed. In this final section the following should be evident from the discernment week:

- Awareness, willingness and desire to grow spiritually and in terms of interpersonal skills
- Ability to manage own personal expectations, to be pragmatic and not overly idealistic
- Ability to negotiate with a number of others and turn take.
- Ability to submit and work accountably to authority in the Community, Parish and Diocese.

8.0 Discernment Processes – Written References

Getting references right is extremely important in the discernment process and comes between the initial interview and the short stay/formal interview process. This is crucial to the discernment and wellbeing of the community.

8.1 Four Forms of Recommended Written References

It is best practice to seek to get four forms of written references. The first three using the standard Character Reference, and the fourth using the Incumbent/Chaplain reference forms listed in Appendices 11 and 12:

- Work Character Reference – this can be recent employer or, if straight out of education, recent personal tutor.
- Reference from someone the applicant has lived with – cannot be family related or a partner. Can be members of other residential experience, including shared tenancies with friends.
- General Character Reference from someone with recent experience of an applicant

- Chaplain/Incumbent Reference for a Minister of Religion who has recent experience of the applicant.

8.2 The challenge of a mixed picture from written references

In situations when references give indications that residential community membership is counter-indicated, then the Discernment Panel can halt the process. If there is a mixed picture the panel could decide to proceed but add in questions regarding particular concerns and include such discernment in the short stay if indicated. In a mixed picture a panel can make decisions but any matter pertaining to safeguarding cannot be disregarded.

Evidence for not proceeding with a particular applicant:

- Prosecution for GBH.
- Prosecution for matters pertaining to safeguarding in all its forms.
- Prosecution for driving under the influence of narcotics or alcohol.
- Prosecution for aggressive behaviour.
- patterns of not being able to be accountable or not submitting to authority.
- patterns of anti-social behaviour.
- chronic mental health problems.
- other issues arising from the confidential declaration in the application form.
- patterns of behaviour that are inappropriate for a person to live in a residential community.
- unable to commit to residential community for at least a year.
- history of inappropriate relational behaviour.
- faith being expressed in fundamentalist terms with evidence of not being able to respect theological breadth or differences in discipleship.
- unable to respect or work within Anglican and Diocesan and Parish Church structures.
- difficulty regulating emotions leading to inappropriate behaviour.
- does not have and is unwilling to have a Spiritual Director or if needed a therapist going forward.
- manipulative behaviour.
- Problems around sex-addiction.
- Inability to abide by expected policies, procedures or processes.
- significant cognitive impairments affecting independent functioning.

Evidence for carefully proceeding with a particular applicant:

- serious addiction which is not well maintained.
- victim of abuse with unresolved issues relating to this abuse.
- patterns of being part of a residential community where relationships broke down.
- lack of self-discipline and lack of respecting social boundaries of others.
- lack of standards in personal hygiene or matters of self-neglect.
- lack of interest in new monasticism or motivation around Christian community where motivation for application may be more centred on accommodation.
- long term unemployed who would not have the means to find alternative accommodation if for any reason they are required to move out of the house at short notice in the probationary period or later.
- mixed evidence around any form of controlling behaviour of any kind.
- Inability to communicate effectively in spoken and written English.
- lacking in depth of faith and spirituality or in a process of deconstruction of previously strong faith or spirituality.

Evidence for proceeding but where there may need to be specific clear guidelines needed to put in place around expectations of role

- struggling with depression affecting ability to commit to a rhythm of daily life or work.
- lacking in motivation and enthusiasm.
- has a well-controlled addiction of any kind.
- old one-off evidence of anti-social behaviour as teenager and now an adult.

In the event of a significant physical or mental health problem, then this may be manageable dependent on the support requirements associated with the specific needs of the individual. See Policy 4 Appendix 2 for a General Health Support Plan template to be used in such a situation, which may require a medical report to help in the discernment process.

In the event that the Discernment Panel has concerns and cannot form a recommended way forward, it is advised that the Panel seek the assistance of the local Archdeacon and/or Guardian or members of the Chapter of the Society of the Holy Trinity for advice.

9.0 Discernment Processes – Involvement of Archdeacon and/or Bishop

If the discernment panel has got to a place where they want to proceed with making an offer of a residential vocational opportunity, it is possible that the individual/s are asked to meet with an Archdeacon or a Bishop or other as a final check. The Officer will need to be fully briefed around the role description and the discernment process that has been followed. If the officer does not support the Discernment Panel's decision, this will be referred to the Incumbent of the Parish to liaise directly with the Senior Officer to explore a way forward, which might indicate some expectations of an extended trial period.

10.0 Letters of Offer

When the discernment panel is ready to make an offer, this should firstly be for a month's probationary period. This must all be put into a letter, with clarity that if something goes wrong, it will be for the individual to fund their own alternative housing arrangements. This Offer should also include information on Harmonious Living, please see Appendix 15.

11.0 Beginnings

It is extremely important in these early stages that the expectations of the Community are clear, even in a probationary period, and that the individual's expectations are carefully managed. In particular if the applicant has some experiences of traditional religious communities, it is crucial that the leader of the community or the person supervising/supporting the applicant is really clear that the Community cannot and never will have the depth of a traditional religious community in any aspect of its life.

11.1 Probationary Residential Periods

In the time immediately after joining the residential setting, it is crucial that the terms of the residential period are clear in some form of letter. See the Appendix 16 for example elements of the first month's probationary period.

It is recommended that the applicant sustain the status of being a 'probationary resident' until the periods of Three months and Six Months are completed.

It is suggested that the Prior/Leader and/or Sub Prior meet with members of the residential and dispersed community to receive their views and feedback to take into a formal review of the various probationary periods. If possible, it is suggested that this is compiled into some form of report format. It is suggested that the review meeting happen with at least three members of the former Discernment Panel to include the Prior, Sub Prior and another. See Appendix 17 as a suggested framework for a review meeting.

After the three-month review, there should be a particular plan put in place around learning opportunities for the probationary resident to acquire the expected competencies and knowledge within an achievable time frame.

11.2 Signing of Contracts and key clauses

In the suggested Lodgers Agreement in a Diocesan or Parish Clergy House the following clauses need to be included as additional non-negotiable elements

Section 6 – Licensee’s Obligations

6.11 It is the responsibility of the Licensee to ensure that they have sufficient financial resources set aside in the situation that they would need to move out of the residential setting at short notice, (both security deposit and rent). The Diocese and associated parish will not have a duty of care to cover this cost in the event that a residential member needs to move out.

6.12 To respect the privacy of other residents of the property, and not to use images or other content on social media or internet websites without consent or that defame an individual in the house, or community or parish and diocesan context. Failure to abide by this expectation will lead to the immediate termination of this agreement.

Section 8 – Agreement

(Temporary clause to be removed once the working group has completed its task)

8.5. The Licensee will need to accept the changes regarding the governing policies, guidance and processes of the Community pertaining to this contract. This will require confirmatory signatures to agree to follow the Code of Conduct policy and Community Discipline policy when fully implemented. Failure to do so will constitute a three months notice period for termination of this agreement.

(After completion of the Working Group)

8.5. The Licensee will need to have signed the expected letter to agree to abide by the Code of Conduct and Community Discipline Policy before the Licensor or Licensee are authorised to proceed with a Lodger contract.

8.6. The Licensee will have the status of a ‘probationary resident’ until successful completion of the one, three and six month probationary periods, determined by a formal review.

11.3 Signed statement pertaining to Discipline Policy and Code of Conduct

As stated in the previous section, the applicant will need to sign a specific commitment to abide by the Discipline Policy and Code of Conduct when implemented. See Appendix 18 as a template. Any residential contract should not be signed until this has been completed.

11.4 Residential members and Spaces of Belonging of the Society

Different spaces of belonging to the local New Monastic Community will have differing levels of commitment-and responsibility. It is important for community harmony that everyone accepts that members will have differing roles and responsibilities, and that it is unhelpful to make comparisons based on the false assumption that everyone will display the same level of commitment to the different projects undertaken by the community. Where individuals commit to undertake a particular project or action, it should never be used as evidence that others need to ‘step up’. In such situations this needs careful management of expectations.

11.5 Essentials for Communication and House Meetings

It is good practice for there to be a regular House meeting for all those who live in the residential setting. It is suggested these are monthly and include managing rotas and ensuring that cleanliness and other expectations are being met and shared. When a new probationary resident moves into

the residential setting, it is suggested that this meeting happens within a couple of weeks, and that the residential community should gather for a meal in the first week to ensure that the new probationary resident gets to know everyone living in the House.

It should also be noted, that where community members are living in a shared residential clergy house with the clergy person and their household, such House Meetings will not include household members who are not formally part of the New Monastic or residential community. This boundary is important.

Appendices

1. Template for an Advert for Social Media
2. Template for an Advert for Print Media
3. Template for an Advert for a Flyer
4. Template for Residential Community Application Form
5. Example of a Role Description
6. Example Questions
7. Example Discernment Process Scoring Template
8. Example Letter of rejection following Interview Process
9. Example Template for Discernment Information for Applicants
10. Template for cover letter for Written References
11. Template for Character Reference for Work Related Reference, Character Reference, Lived in residential setting Reference
12. Template for Incumbent/Chaplain Written Reference
13. Example Letter of rejection following References and/or DBS result or following residential stays in community
14. Example Letter of offer of Residential Community subject to probation and signing mandatory expectations letter (Policy One)
15. Moving into shared housing: Guidance on harmonious living in residential settings.
16. Example of expectations of the first month's probationary period.
17. Template of a Review Meeting report
18. Template for Signed acceptance to abide by the Code of Conduct and Community Discipline Policy.