

Forms for Use in the Preparation for Ministry Process

Maintaining documentation of a presbytery's work with each of its inquirers and candidates has become increasingly important over the years as the legal principles of "due diligence" and "negligent supervision" have developed in the courts. In brief, "due diligence" refers to whether or not a supervisory body fully complied with its policies and procedures as well as any widely accepted "best practices" within its field. "Negligent supervision" can be alleged anytime a problem arises with a person under supervision and it can be claimed that the problem would not have occurred had the standards of "due diligence" been met or had the supervisory body properly responded to information gained through the exercise of "due diligence." Should a presbytery ever need to defend against allegations of either failure to exercise "due diligence" or "negligent supervision" in its oversight of an inquirer or candidate (G-2.0605), simply saying it followed its procedures and responded appropriately will not be sufficient; it will need to provide contemporary documentation of those actions.

A set of forms developed by Mid Council Ministries of the Office of the General Assembly that may be used by presbyteries in documenting the standard preparation process is provided on the Preparation for Ministry website (<http://oga.pcusa.org/section/mid-council-ministries/prep4min/forms-used-preparation-ministry-process/>). Because these forms take advantage of some more advanced features in Adobe Acrobat, you must use a recent version of the Adobe Acrobat Reader (version 9 or later); other programs and applications for working with PDF files may not support these features and may strip them from the files. You can download the newest version of Adobe Acrobat Reader for your particular computer or device by visiting <http://get.adobe.com/reader>.

Most of these forms are primarily for use with the internal procedures of presbytery committees or commissions overseeing preparation for ministry, and so may be customized to meet the particular needs of individual presbyteries. Applicants, inquirers and candidates downloading forms from the website should confirm with their respective presbytery's committee whether they may use the PDF files posted there or will need to request customized versions from their particular presbytery.

Presbyteries who wish to use Word and Excel versions of the files as the basis for creating customized forms for their presbytery may access those files from the [Sample Preparation for Ministry Forms](#) page. Because Form 6 is used to attest to calling presbyteries that a candidate has been "certified ready for examination for ordination, pending a call," that form should not be modified.

All reporting to Mid Council Ministries of the Office of the General Assembly is now done online, and so none of these forms are to be sent to the OGA for processing either electronically or in hardcopy. Presbyteries needing assistance using the online preparation for ministry

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management site (<http://p4m.pcusa.org>) should see the resources available in “Reporting actions to others” on page 4.

You may access the forms from digital versions of this *Advisory Handbook* by clicking on their short designations (for example, [Form 1A](#)) in the descriptive the descriptive list that follows.

Initial application forms

There are four separate forms that make up the application for enrollment as an inquirer.

[Form 1A](#) “Application to be enrolled by Presbytery as an Inquirer”

To be completed initially by the applicant seeking to be enrolled. Both the committee/commission overseeing preparation for ministry and the presbytery’s actions regarding the application are recorded on this form. It provides basic information regarding the applicant’s background, identity, and interests. This form includes a list of personal references.

[Form 1B](#) “Questions for Reflection”

These questions are to be completed by the applicant as a basis for direct discussion first with the session of the applicant’s home church and later with the presbytery’s committee/commission overseeing preparation for ministry.

[Form 1C](#) “Financial Planning for Theological Education”

Using basic information provided by the applicant, this spreadsheet generates a projection of the applicant’s financial resources and needs relative to the required seminary training.

[Form 1D](#) “Session Evaluation and Recommendation”

This form is completed by the applicant’s session and forwarded along with the other application forms to the presbytery’s committee/commission overseeing preparation for ministry. The form includes questions that may guide the session’s discussion with the applicant and provide support for its recommendation to the committee/commission overseeing preparation for ministry.

Forms for enrolling an inquirer

These forms are used by applicants and their committee/commission overseeing preparation for ministry when a decision has been made to recommend the applicant be enrolled by the presbytery as an inquirer.

[Form 2A](#) “Report of Consultation regarding application”

In addition to formulating its recommendation to the presbytery to enroll the applicant as an inquirer, the committee/commission overseeing preparation for ministry should also establish [From the Advisory Handbook on Preparation for Ministry PC\(USA\), Release 2.1 \(December 2017\)](#)

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goals for the first year the new inquirer will be under care. This form records the growth objectives agreed to by the new Inquirer and the committee/commission overseeing preparation for ministry. The completed report is sent to the enrollee, the theological institution, and the sponsoring session.

Form 2B “Covenant Agreement and Inquirer Release”

A signed acknowledgement of the new covenant relationship entered into by the inquirer, the session and the committee/commission overseeing preparation for ministry. The inquirer release sets in motion an understanding that permits the committee/commission overseeing preparation for ministry to secure information necessary to make responsible decisions and recommendations.

Forms for consultations

These forms are used to prepare for and report the outcomes of a consultation. The same forms are used in the inquiry and candidacy phases as well as for consultations once a candidate has been “certified to ready to be examined for ordination, pending a call.”

Form 3 “Pre-consultation report on development areas”

This report, completed by the inquirer/candidate before each consultation, evaluates progress in accomplishing previously agreed-upon goals and objectives. The form requests a listing of completed courses, and includes specific questions to be addressed in each of the five growth areas.

Form 4 “Report on Consultation”

A summary report of the consultation, completed by the committee/commission overseeing preparation for ministry and the inquirer/candidate, that indicates developmental progress in the five key areas along with growth objectives agreed to for the next year. The completed report is sent to the inquirer/candidate, theological institution, and sponsoring session.

Forms for advancing to candidacy

Inquirers and their committee/commission overseeing preparation for ministry may use these forms when a decision has been made to recommend the presbytery advance an inquirer to candidate status.

Form 5A “Application to be enrolled by Presbytery as a Candidate”

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To be completed initially by the inquirer seeking to be advanced to candidacy. The recommendations of the session and the committee/commission overseeing preparation for ministry along with the action taken by the presbytery are recorded on this form.

Form 5B “Session evaluation and recommendation for Candidate”

This form is completed by the inquirer’s session and forwarded to the presbytery’s committee/commission overseeing preparation for ministry. The form includes questions that may guide the session’s discussion with the inquirer and provide support for its recommendation to the committee/commission overseeing preparation for ministry. Attach a letter explaining rationale for the session’s action in light of inquirer’s suitability for ordered ministry.

Form 5C “Report of Consultation to become a Candidate”

A signed acknowledgement of the new covenant relationship entered into by the candidate and the committee/commission overseeing preparation for ministry. This form also establishes growth areas for candidate. The completed report is sent to the inquirer/candidate, theological institution, and sponsoring session.

Form 5D “Covenant Agreement and Candidate Release”

A signed acknowledgement of the new covenant relationship entered into by the candidate, the session and the committee/commission overseeing preparation for ministry. The candidate release sets in motion an understanding that permits the committee/commission overseeing preparation for ministry to secure information necessary to make responsible decisions and recommendations.

Reporting actions to others

Presbyteries will need to report certain actions to others across the church. When a candidate who has been “certified ready for examination for ordination, pending a call,” is being considered by any presbytery, the Form 6 along with its supporting documentation should be sent to that presbytery’s committee or commission responsible for its minister members. General reporting about a person’s status with their supervising committee/commission overseeing preparation for ministry, transfer of care to another presbytery, withdrawal/removal from the process, certification of readiness to receive a call, and ordination to the role of minister of the Word and Sacrament are reported to Mid Council Ministries of the Office of the General Assembly through the preparation for ministry management portal (<http://p4m.pcusa.org>).

Form 6 “Summary Report of Final Assessment”

This form, completed by the committee/commission overseeing preparation for ministry, acknowledges that the committee/commission overseeing preparation for ministry of the **From the Advisory Handbook on Preparation for Ministry PC(USA), Release 2.1 (December 2017)**

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candidate's presbytery has conducted a final assessment of the candidate's preparation and readiness to begin ministry. It certifies that she/he has successfully completed all the requirements of the denomination and the committee/commission overseeing preparation for ministry and so is ready to be examined for ordination. It should be accompanied by supporting documentation that is identified on the form. (Since this report may need to be shared with another calling presbytery, all presbyteries should use this form as issued.)

Online Reporting to Mid Council Ministries of the Office of the General Assembly

Since January 2014 the Office of the General Assembly has exclusively used online management systems for presbyteries to report actions related to their inquirers and candidates. The system also provides direct access to senior ordination exams and their evaluations as well as Bible Content Exam results, and is to be used by presbyteries to report their ordination exam readers to the Presbyteries' Cooperative Committee on Examinations for Candidates (PCC). Both a "User's Guide" and a "Quick Reference Sheet" have been prepared to assist presbyteries in the use of the system.

[Download](#) the "User's Guide" (with screen shots and full descriptions)

[Download](#) the "Quick Reference Sheet" (two page summary of main operations for creating and managing inquirer and candidate profiles)