

Education for Ministry
Manual for Coordinators

Appendix C-1
Common Lessons and Supporting Materials

The University of the South
Sewanee, Tennessee USA
2008

A WORD OF WELCOME

We welcome you as a coordinator for the Education for Ministry program. You hold a unique position that is very important, for you serve as the major link between the EfM staff in Sewanee and your diocese.

The EfM program depends upon willing students and capable mentors. Our trainers work hard to prepare the mentors for their tasks so that they will provide effective guidance to their groups. You, the coordinator, hold that network together.

This handbook is to help you guide and manage the EfM program in your diocese. Our staff intends to help you in these tasks in every way possible. We look forward to working with you so that your diocese may make effective use of the resources we offer from The School of Theology Programs Center in Sewanee.

Thank you for taking on this important work. We hope that you will find it interesting, fulfilling, and rewarding.

2008

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The Education for Ministry Program

EfM stands for the Education for Ministry program of The School of Theology Programs Center. It is a program of theological education by extension that includes both individual study and group work in seminars under the guidance of trained mentors. EfM is used throughout the Episcopal Church as well as in other denominations and in foreign countries. We are working to replace the specially formatted audiotapes for the visually impaired with an HTML format as well as another set of audiotapes that can be used on the World-Wide Web.

EfM students work with both the Old and New Testament, biblical exegesis, systematic theology, church history, ethics, liturgics, ascetical theology, and contemporary theological issues. In the seminar groups, students share the stories of their faith journeys and reflect on issues from their lives, their ministries, and their studies. The program is designed to enable group members to make connections between biblical tradition, studied personal experience, their own ministries, and the world in which they live. Through the shared life and study of the seminar group, insights and learning lead to both increased knowledge and spiritual growth.

The program takes four years to complete. Students register for one year at a time. They participate in seminar groups that meet regularly during a nine-month academic cycle.

Ideally EfM enables baptized Christians to relate their faith to their lives and ministries in the world. The goal of EfM is to prepare lay persons to live out by word and deed the promises made at baptism—to love God, to serve Christ, and to proclaim the Gospel.

EfM students belong to seminar groups of six to twelve persons plus a mentor. Mentors must be trained and accredited to lead these groups. They contract with their groups and the EfM program and are paid an honorarium for their work. The support for the program comes through an administrative office and a training system centered in Sewanee.

The EfM program usually works through parishes and dioceses. Every sponsoring diocese (a diocese under contract with The University of the South) has a coordinator who acts as the link between The University and the diocese. While individual groups enroll directly through The University of the South, the coordinator arranges the training for the mentors, acts as a focal point for EfM in the diocese, and is the person in charge of promoting and supporting EfM.

The EfM system thus operates at five levels: students, mentors, diocesan coordinators, EfM trainers, and EfM staff. Through a system of feedback, reports, and training, all five levels of the EfM system contribute to the development of materials and methods. The growth and development of EfM is something in which we all share as we seek to provide the highest possible level and the best quality of theological education to the laity.

What is its purpose?

How does EfM work?

Appointment of the Diocesan Coordinator for Education for Ministry

The bishop or judicatory head (or his or her representative) and the EfM program director consult and jointly appoint the diocesan coordinator for Education for Ministry. The coordinator serves as the link between Sewanee and the diocese and needs the support of both in order to serve effectively. The coordinator represents the diocese and the EfM program to students, mentors, and graduates as well as to the general public.

The bishop (or the bishop's representative) makes the appointment official with a letter to the appointee and a copy to the EfM program director. The director then sends a letter to the new coordinator to confirm the appointment.

**Appointing
the diocesan
coordinator**

Qualifications of the Diocesan Coordinator

Enthusiasm for and knowledge about the EfM program are the first prerequisites. The best candidates are persons with EfM experience as students, mentors, or trainers. Coordinators need not be ordained, nor need they be professional church workers. Some very effective coordinators are lay persons or non-stipendiary clergy. Others are clergy or lay persons on diocesan or parish staffs.

The coordinator should be well acquainted with the diocese and its structure in order to represent the EfM program effectively. Knowledge of the diocesan organization helps a coordinator decide how best to promote the program. In return, the coordinator needs support from the diocesan staff and should be in a position to cultivate such support.

Knowledge of the educational methods used by EfM and familiarity with the administration of the EfM program are essential. A coordinator should complete mentor training and be sufficiently familiar with the content and methods of EfM to make an effective presentation about the program.

A new coordinator should be willing to attend one of the coordinators' training conferences held regularly in Sewanee. These conferences provide opportunities to learn about EfM and also to participate in its development.

The coordinator should seek opportunities to make public presentations and should look for occasions to promote the program. Promotion includes writing and disseminating articles and news bulletins. Presenting the EfM program at diocesan events such as convention, deanery, and parish meetings or adult education forums is helpful, too. Sewanee can support this by providing materials and convention exhibits.

An ability to perform administrative and managerial tasks is expected. These involve administration of the EfM program in the diocese, renewing contracts, making reports to the diocese and to Sewanee, and organizing training sessions and other EfM functions in the diocese.

The coordinator should be able to resolve problems and can be very helpful at the local level when asked to assist on those occasions when difficulties or special questions arise within an EfM group.

Diocesan or judicatory authorities may add qualifications for their diocesan coordinator.

Who makes a good coordinator?

Knowledge of the diocese

Knowledge of the EfM program

Promotion of EfM

Administrative duties

Problem solving

Diocesan requirements

Responsibilities of the Diocesan Coordinator

The diocesan coordinator plays a vital role in maintaining a healthy EfM operation. That role falls into three areas:

- Promotion and publicity
- Selection, preparation, and support of mentors
- Support and communications

Managing EfM in the diocese

Promotion and Publicity

Public relations and promotion are primary functions of the coordinator. As a promoter of EfM, the coordinator can take advantage of local opportunities to make the EfM program known to all people in the diocese. The keys to success are personal contacts, repetition of the basic information about EfM, and a variety of approaches in presenting this information. Ingenuity and persistence are important ingredients.

Ingenuity and persistence

The coordinator advances the EfM program by serving as a source of information to all who might be interested both within the Episcopal Church and in the wider community. The coordinator, mentors, and current and past students are the local folks to whom interested people in the community can turn for information about EfM. For information about policies, availability of training, and beneficial aspects of the program, one turns to the coordinator and to Sewanee.

Providing information

Although mentors do recruit participants and start EfM groups, the diocesan coordinator can also promote the EfM program by making presentations before diocesan, parish, and other interested groups. In a region where EfM is not active, the coordinator will be its principal advocate. The coordinator is in a position to know where EfM is active in the diocese and can identify locations where it is likely to take root if effectively introduced. The *Manual for Mentors* contains a model for an introductory session.

Making presentations

The EfM staff sends each diocesan coordinator regular reports of EfM activity. These reports contain the names and addresses of active mentors, persons who have attended mentor training, students (by groups), and EfM graduates.

Enlisting help

Students and graduates can be an important source of support to the coordinator. The coordinator may contact them and enlist their help with the promotion of the EfM program. By testifying to the importance of the EfM program in their lives, these people can communicate effectively the validity and importance of the program.

Address changes are routinely keyed in our attempt to keep our data current and accurate. We request that the coordinator please report changes as soon as they are known in order to help keep data up-to-date.

Annual conferences

Many dioceses hold annual conferences for students, mentors, graduates, and people interested in the EfM program. These conferences usually take place over a weekend. They offer excellent opportunities to build relationships and a sense of community among the people involved in the EfM program. Questions are asked and answered, information disseminated, and links made between people who share similar interests. EfM staff from Sewanee frequently attend these conferences to speak to the group or lead workshops. The agenda for an EfM conference is generally based on the suggestions of the participants.

Diocesan conventions

The diocesan convention offers several opportunities for publicizing and promoting EfM. Displays are available on request from Sewanee and are sent for use at conventions or other functions where a display would be useful. An EfM booth or display table provides a meeting point for former and prospective EfM people. In addition, by wearing special name tags and being visible during the convention, EfM students and mentors can achieve the high visibility and recognition they deserve.

Promotional materials

Promotional literature—prospectuses and brochures—is available with the display or directly from Sewanee. Please ask for the quantities of these materials you need. When new materials are published, supplies are sent to each coordinator.

Recognizing graduates

Recognizing graduates of Education for Ministry provides a natural opportunity to salute lay ministry and publicize EfM. For example, a parish may recognize its graduates of EfM at a regularly scheduled service or at a special occasion, with the bishop or other diocesan official taking part in the ceremony. Certificates, sent by Sewanee, may be presented at this time. The story and pictures of the event are good publicity. More importantly, those who have worked long and hard through study and participation to discern and develop a sense of their individual and shared ministry are honored.

News releases

Newspapers, radio, and television—diocesan, parish-wide, and secular—are good media for keeping people informed about EfM. Newsworthy items include graduations, the formation of new groups, mentor training sessions, growth of the program in the diocese, and special ministries which EfM students and graduates have undertaken. Mentors may be enlisted to help, as well as those who may have access to the press, in order to gather and print news for publication. Such releases are most interesting when local information is part of the story so that people in the diocese will understand how the wider program relates to them. Please forward to Sewanee those news items about EfM in your diocese that may have national interest. We may consider disseminating the story to a larger audience.

The EfM NEWS is mailed and E-mailed several times a year. All those currently

involved with EfM—graduates, students, recent mentor trainees, bishops, and deans of seminaries—receive this newsletter.

We welcome news of mentors, groups, and individuals and hope coordinators will send in happenings that we may consider for inclusion. Send them to the office of the EfM Program Director. You may submit longer articles (more than two pages, double spaced) to Sewanee Theological Review, The School of Theology, Sewanee, TN 37383-0001.

**The EfM
newsletter**

The **DIOCESAN COORDINATOR** is published three times a year and is made available electronically to coordinators along with the reports of EfM activity in your diocese. Please send news items to the EfM Program Coordinator so that they can be considered for inclusion in this newsletter. We are interested in coordinators' personal accomplishments, coordinator techniques that have proved successful, new ideas for carrying out the role of coordinator, and any news items or ideas that can aid coordinators at large.

**The coordinator
newsletter**

Look for groups, diocesan and regional, where there could be potential interest in EfM and schedule yourself to speak to them. The Commissions and Committees on Ministry, Lay Ministry, and Christian Education are groups that share an interest in what EfM is doing in the diocese. The coordinator may be invited to serve on these committees or as a liaison between EfM and the diocesan committees that have an interest in Christian education.

**Speaking
engagements**

Seek help from other people involved in EfM. Our students and mentors are our most convincing witnesses. Among them you will find energetic people willing and able to speak at meetings, write news releases, tell about EfM in interviews, speak informally at diocesan, regional, and parochial gatherings, staff publicity booths, and help with administrative tasks. They may be seeking ways to become involved, and the coordinator can give them a chance to tell their stories.

Recruiting help

Mentor Recruitment and Screening

Without mentors there can be no students, no EfM groups, and no EfM program. To enable EfM to develop and thrive, a coordinator needs to recruit potential mentors at every opportunity. Two good sources for new mentors are EfM graduates and the clergy, especially clergy new to the diocese.

**Criteria for re-
cruiting
mentors**

The effectiveness of the EfM program depends upon able guidance by the mentors. Although they do not need to be scholars, mentors should be comfortable with critical and historical approaches to the study of the Bible and church history. Effective mentors are able to accept various points of view about key issues of our faith without insisting that theirs is the “right” one. They are asked to create a climate in which students are able to explore their own thoughts and develop their faith.

Effective mentors should be able to guide a group in its development as a cooperative community sharing a venture. Those who expect to lecture to their groups or who are unable to work sensitively in a learning community will be ineffective and even detrimental to the EfM program. Leading an EfM group is an acquired skill, and not everyone is suited to this kind of leadership. The seminar format provides both mentors and students an opportunity to become familiar with multiple methods of adult learning.

For a sample form to use in the recruitment of mentors, see page 36. Feel free to adapt it to your own use. Enclose an EfM brochure with this letter and a copy of the description of mentor training found on page 37.

Screening

We ask that the coordinator do some preliminary screening of candidates for mentor training. Discouraging individuals who obviously are not suited to the task of guiding an EfM group avoids potential embarrassment for everyone—the mentor, the student, the diocese, and the EfM program.

While screening out unsuitable candidates rests first with the coordinator, that function also belongs to the trainer who accredits future mentors. Before failing to reaccredit an existing mentor, the trainer will contact us in Sewanee. This happens very rarely. Prospective mentor trainees should understand that being a mentor may not be for them. Attending mentor training, therefore, is no guarantee that an individual will be accredited as a mentor by the trainer.

Supporting EfM Groups

A coordinator may know when EfM groups need additional members to remain viable, that is, when they have fewer than six participants. A coordinator's help in the search for new members is helpful. Occasionally a coordinator is asked to direct new students to existing EfM groups. Word is sent from Sewanee to the coordinator when someone new to the diocese is looking for an EfM group.

Finding new mentors

Coordinators can help a group replace a mentor who has moved or become unable to continue. It is helpful to know who the trained mentors are. Three times a year, Sewanee posts to Blackboard reports for use by the coordinators.

Working out difficulties

Occasionally a coordinator may be asked to get involved in the management and resolution of conflicts. Feel free to call Sewanee when such difficulties arise. We must recognize that we cannot satisfy everyone all the time and that, when working with large numbers of people, unusual demands are sometimes made. Our goals are to settle matters fairly, maintain the good will and support of those with whom we work, and protect the integrity of the EfM program while showing the love of Christ in our relationships.

Relationships and communications

A coordinator acts as a communication link among mentors, students, the diocese, and the EfM program. We encourage coordinators to communicate with us frequently. We count on them, as our field representatives, to keep us up-to-date

on current happenings. Please use our toll-free number, 800/722-1974, to keep us informed.

If you must give up the position of coordinator for EfM, we ask that you help the diocese and Sewanee make the transition to a new coordinator as smooth as possible. As far as practical, begin working with Sewanee and the diocese well in advance of the transition. Pass on materials and manuals, and arrange for the new coordinator to receive all necessary diocesan and EfM information. Remind the bishop or diocesan official that Sewanee needs a copy of the letter appointing the new coordinator. Encourage the new coordinator to attend a Coordinators' Training Conference at Sewanee.

Changing coordinators

Mentor Training

The Coordinator's Role

One of the most valuable services a diocesan coordinator performs is arranging local training events for mentors. The availability of training in the diocese builds community among mentors and saves mentors' time and travel expenses.

Schedule training as early as possible. We recommend six months to a year in advance. With early planning, facilities will be available, participants can put the event on their calendars, and we can arrange for a trainer.

**Scheduling
events**

Training is available in other dioceses, at Sewanee, and at other locations, including some of the Episcopal seminaries. Trainees from your diocese may go to any of these places for their training. We maintain a master schedule of all training events at Sewanee. You can also find it on our Web site, <http://www.sewanee.edu/EfM>. When planning your training, consider what other events are to take place and work with other coordinators in your geographic area.

The contract each diocese has with the University provides for regular training at a location of the coordinator's choice. Following the terms of the contract, the EfM program pays the honoraria to the trainers. Travel and incidental expenses are billed to the diocese and sent to you to arrange for payment.

**Paying for
training events**

Each coordinator can request a list of mentors in the diocese, indicating their last training date as needed. Active mentors must receive training every 12 to 18 months. If you have any questions, please contact the Sewanee office.

**Identifying
those who need
training**

The Purpose of Mentor Training

Mentor training and regular in-service training maintains the quality of the EfM program. This helps to assure our students that the mentors who work with them are well prepared, up to date, and able to function effectively.

Training enables the mentor to facilitate and guide the seminar group in all aspects of the program, including its administration. An initial purpose of mentor training is to discern with the first-time participant whether he or she has the inclination to become a mentor for the EfM program.

Mentor training

A training session introduces the four-source model of theological reflection used in the EfM program. Training includes a presentation of the methods used by the EfM program to facilitate reflection and gather learnings. The training session emphasizes the place and purpose of spiritual autobiographies in the EfM program. Trainees learn how to work with groups effectively and solve problems that may occur within the seminar group. The place of worship in the group is established, and administrative procedures are addressed.

The initial training supports the mentor's beginning work with an EfM group. Mentors return every fourth accreditation cycle for this basic/in-service training since the fundamentals presented in mentor training are essential to the life of the EfM program.

Continuing training and formation training

A trainer may accredit an active mentor who has completed two training events as ready for mentor formation (advanced training). Either mentor training or formation may be used thereafter for reaccreditation. Formation training topics are designed to increase a mentor's effectiveness. Sessions are open to qualified mentors who have attended two mentor trainings and who have an EfM group registered with the program.

The opportunity for direct communications between Sewanee and the mentors is an additional important function of training. Training provides an occasion to share information about developments in the EfM program, and for active mentors to relate what they are learning. Many helpful changes have resulted from comments made by EfM students, mentors, trainers, and coordinators.

Training Events

Who must complete mentor training?

To become a mentor of an EfM group, a person must complete mentor training and be accredited by a mentor trainer. Mentor training is for persons who have never been mentors and serves as the second training for mentors who are leading groups. It is also for the mentor who has been out of the program for three or more years and would like to begin a group again. Even experienced educators or former participants in an EfM seminar must complete mentor training before beginning a group.

What is mentor training?

Mentor training is an intensive session requiring a minimum of 18 contact hours. Six to eight trainees work under the leadership of a trainer accredited by the Sewanee staff. At the end of the training, the trainer will inform participants whether or not they may begin a group.

How long is the training valid?

The accreditation of a mentor is valid for 18 months. Individuals whose accreditation as a mentor is valid may begin a new group or become the mentor of an existing group. Honoraria are paid only as long as a mentor maintains his or her accreditation. If 18 months have elapsed since a mentor has attended any training accreditation, that person is removed from the list of active mentors, and that mentor forfeits his or her monthly honorarium until training has taken place.

Who decides who may attend?

Diocesan coordinators decide who can attend training events in their dioceses, following the guidelines in the *Manual for Mentors*. Individuals who come to mentor training should have an interest in becoming mentors and be suited for the task.

Sometimes an individual may attend a training event only to gain knowledge of EfM and the methods of theological reflection. The coordinator may encourage

this on a “space available” basis with an understanding that mentors and prospective mentors have priority.

We find that the first training session introduces the mentor to the basics and, after some experience, the second session provides necessary reinforcement. First- and second-time trainees may attend together. The second session also requires 18 hours of participation.

Why return for mentor training?

Formation Events

At the end of two training cycles, a trainee may decide jointly with the trainer that he or she is ready to attend a mentor formation (advanced) event for the next reaccreditation. Only mentors who have groups enrolled and are accredited for formation can attend these events.

Who may attend mentor formation?

The following are mentor formation topics:

Topics for mentor formation

- Advanced Theological Reflection
- Common Lessons
- Design Skills
- Equipping for Ministry
- Experiential Learning
- Four-Source Theological Reflection
- Group Skills and Human Interaction
- Living with Conflict
- Myers-Briggs
- On-Line Mentor Training
- Power and Authority
- Spirituality
- Transitions in the Midst of a Changing World
- Vocation
- Worship

Experienced mentors have the opportunity at these events to refine their skills and develop their knowledge of how groups function. A description of these formation topics appears in Appendix D.

Deciding the topic for formation events

In order to decide which mentor formation event to schedule for your diocese, it is wise to poll those mentors qualified for formation training. Try to choose the topic that will meet the needs of a particular group or that will help with a problem that a mentor has experienced. The report of active mentors in your diocese designates those eligible for formation. When a sufficient number of formation-eligible mentors warrants it, contact Sewanee to arrange for a trainer who is skilled in that particular topic. Mentor formation and mentor training may be offered simultaneously if there is enough space for more than one group to meet comfortably.

It is sometimes advisable for dioceses to join together and arrange a regional mentor formation training event. These events are advertised nationally by EfM. Often, mentors come long distances to attend a mentor formation event because they like the location and want to train in a new environment. The interchange among mentors and trainers from different dioceses and parts of the country enriches the event and increases the awareness of the geographical and cultural diversity.

Provisions for Alternate Training

Active mentors who have attended three consecutive EfM training or formation events and who currently lead an EfM group may substitute an alternate training to update their fourth accreditation. This training requires at least the same amount of time as Mentor Training (18 contact hours) and should support the mentor in his or her work with the EfM program. An eligible mentor must write the EfM Program Specialist in Sewanee, describing the proposed alternate training, and requesting approval. If the intended substitution is approved, the mentor will be sent two forms to be completed after the alternate training has taken place. These forms include an evaluation of the EfM seminar group and a report of the alternate training. When the mentor has completed the alternate training, he or she must complete the forms and return them to the EfM Program Specialist within two weeks. A letter will be sent to the mentor notifying him or her of renewed accreditation for another 18-month period beginning at the completion of the alternate training. After a mentor has elected to use an alternate training for a cycle of accreditation, he or she must attend an EfM training for the next cycle of accreditation. (For more information about alternate training, see the *Manual for Mentors*.)

Managing a Training Event

Mentor training should be provided on a regular basis in all the sponsoring dioceses in accordance with the contractual arrangements between the dioceses and Sewanee. Appendix E provides the checklist a coordinator should use to arrange and coordinate mentor training events.

1. **Set a date and reserve a location that suits your situation.** Ideally, training sessions take place in a conference or retreat setting, where meals are available. Arrange for food service if it is not provided. Less ideal, but possible, is for participants to commute to the training event. Make sure there is enough space if several training events are being held at the same time.

2. **Plan the schedule for the event.** Remember that 18 contact hours are needed. These 18 hours are working times and do not include meals or long breaks. A typical training event begins with lunch on the first day, with training beginning that afternoon and continuing through the evening, the next day and evening, and concluding after lunch on the third day. Experience has shown that training over only two days is not effective and should not be done.

3. **Notify Sewanee of your plans well ahead of time.** (We suggest at least six months' lead time.) Tell us what kind of training event(s) you would like to hold, when and where they will be, and your proposed start and end times. At Sewanee we will make arrangements with the trainer and monitor the training event. The coordinator will receive a contract letter stating who the trainer is. The trainer will contact the coordinator to arrange the details of the training event.

4. **Calculate a budget in advance.** Set a fee for the event. It should pay for the room and board of the participants and help pay for the reservation of the meeting place and the travel (\$350 per trainer), housing, meals, and incidental expenses of the trainer. Trainer travel expenses covered in the \$350 flat fee that the Programs Center will charge coordinators include air fare, rental car, parking, etc. — any expenses the trainer incurs traveling to the training site or getting back home. If a trainer has to stay an extra day and have meals on that day because of traveling to you from a long distance as the result of a Programs Center decision to send that trainer to you, those expenses are included in the \$350 trainer travel flat fee. If, however, a coordinator requests a particular trainer or training event type which requires a trainer to travel a long distance and stay an extra day and have meals on that day, then the coordinator will be responsible for those expenses. Estimate expenses by counting on one trainer for every eight participants. We suggest that you ask for an advance deposit with registration. At least a portion of the fee should not be refunded if an individual cancels within three weeks of the training event. This helps insure that people who register will actually attend.

5. **Begin publicizing the training event in your area.** Use the “Active Mentor and Trainee List”, which is available on Blackboard (with updates available upon request), to check on the last training dates and training status of the mentors in your diocese and contact likely participants individually. The trainees should make reservations with you and send you an advance deposit. Remind registrants that EfM training is intensive work. They are expected to arrive on time and to remain for the entire 18 hours in order to be accredited. Trainees should also know up front that accreditation is not automatic, but at the trainer's discretion.

6. **Be sure that mentor training sessions have no less than six and no more than eight participants.** In special circumstances, the EfM program director and the trainer may give permission to deviate from this rule, but if more than eight want training, you should begin a waiting list. If several more than eight are interested, it may be worthwhile to consider offering two training events. If all trainees have not trained before, more than eight is not advisable. The number of participants in mentor formation may vary. (See Appendix D for guidelines.) Be sure to keep Sewanee apprised of unusual registration numbers.

7. **Send a confirmation letter to those who will attend the event,** explaining the attendance requirements [that training requires 18 contact hours and full

attendance is mandatory; late arrivals and early departures are not acceptable], living accommodations, and a list of items that trainees should bring with them [*Common Lessons and Supporting Materials* notebook, mentor's manual, Bible, prayer book, comfortable clothing, etc]. (See sample letter, Appendix F.)

8. **Three weeks before the event**, call Sewanee and order the materials for the session. For a mentor training session, indicate how many trainees are coming for the first time. Remind those current mentors who are returning for mentor training or mentor formation to bring their manuals and *CLSM* to the training session. There are no new materials for formation-level sessions, but the coordinator and the trainer will receive administrative forms that must be returned to Sewanee.

9. **Contact the trainer if you have not yet communicated**, making sure you are aware of travel plans and arrangements. Please inform the trainer of any special situations that may exist in your diocese of which he or she should be aware. Let the trainer know if a training registrant has special needs or has had a program-related problem in the past. Ask the trainer about any preferences or special needs; for example, a non-smoking room, special supplies needed, and so on.

10. **When the trainer arrives, provide him or her with the materials you have received from Sewanee.** The trainer is responsible for the participants' registration forms, the trainer's report forms, and the distribution of the start-up kits for newly accredited mentors. In addition to the *Mentor's Manuals*, trainees who do not have EfM groups will receive the *Common Lessons & Supporting Materials* notebook. Additional supplies of brochures and prospectuses may be obtained directly from Sewanee.

11. **Help the trainer concentrate on training only.** He or she should have a private room. The trainer is not responsible for collecting fees, arranging meals and housing, or dealing with administrative details for the conference. These are the duties of the coordinator, or, if you are unable to attend the event, someone you delegate to handle these details. If you must be absent during a training event, be sure to train your delegate. Provide him or her with whatever information, materials, and supplies needed to administer the training event effectively. Ask the delegate to read this section and provide a copy of the checklist that appears in Appendix E. Explain the tasks and your expectations. The trainer will file a report of the event and send it separately from the report filed by the coordinator.

12. **After the event, fill out the coordinator's report and the authorization for your honorarium and send them to Sewanee.** (See sample forms, Appendices G and H.) If more than one event was held at the same time, be sure to fill out the correct form for each. Each event is assigned an event number, which is placed on all the administrative forms. The trainer's name will be

on each one. When your report has been received, the EfM program will send the coordinator a \$100 honorarium for each event. This payment can be made only to the diocesan coordinator, even if someone else administers the training in the coordinator's absence. Allow two weeks for the check to reach you.

Responsibility for Expenses

Under the contract you have with Sewanee, the number of training sessions allowed each year is specified (two per year under the Minimum Service Contract; one per year plus one training for every seven active EfM groups under the Full Service Contract). If a training session does not fall under the contract, the diocese will be expected to cover the honorarium for the trainer unless prior arrangements have been made with Sewanee.

The coordinator is responsible for seeing that all local expenses incurred during the training event are paid. These include rental for the meeting place and room and board of the participants, for which the trainees have been charged.

For all training events, the diocese is expected to pay the room, board, and transportation expenses of the trainer(s), as well as the trainer's incidental expenses, such as telephone calls and copying.

Payments to Trainers

Each trainer files a detailed report with Sewanee which includes a financial report and documentation of expenses for the training event. The EfM program reimburses the trainer for expenses and pays the trainer's honorarium. **The trainer's expenses (not the honorarium) are then billed to the coordinator by Sewanee.**

Cancellations

Occasionally circumstances require that an event be cancelled. Unless there is an unforeseen emergency, we expect cancellations of training events to be made two or more weeks before the event so that everyone involved can be notified in a timely manner. **When you decide to cancel an event, call the EfM office immediately.** We will notify the trainer.

Reports

After each training event, you are asked to send in the coordinator's report of training and an honorarium requisition form confirming that the training event was held. Both of these forms are sent to you with the materials for the training event. (See Appendices G and H.)

**Training event
report**

Keep your diocesan officials informed. You will possess information about people who have completed EfM, trained mentors, and EfM students that will be useful to diocesan officials. Dioceses frequently seek qualified people to participate in diocesan activities and the information you have is an important resource to you and the diocese.

**Annual report to
the diocese**

Each year you should report to your diocese about EfM. You may arrange to present this report at the annual diocesan convention (council) and have it included in the Diocesan Journal. This is an opportunity for you to inform delegates from each parish about the EfM program. It also preserves a historical record of EfM activity.

Coordinators who receive honoraria under the provisions of their diocesan contract will be sent an IRS Form 1099 if the honoraria in one calendar year total \$600 or more. The honoraria, regardless of the amount, constitute reportable income. Coordinators are independent contractors who relate to us and to the diocese the same way that mentors relate to Sewanee and their EfM groups.

**Income tax and
IRS Form 1099**

Diocesan and Parish Contracts

All dioceses do not have the same contractual arrangements with Sewanee. Some dioceses do not have any contract, although there may be a coordinator. The coordinator should work with the diocesan office in order to know what the contractual arrangements are. Normally contracts are filed in the diocesan offices and at Sewanee.

Who has the diocesan contract?

When it is time to make the contract payment each year, Sewanee sends the diocese a statement. The coordinator receives notification when invoices are mailed to the dioceses. Contracts are either on a calendar year basis (January 1-December 31) or fiscal year basis (July 1-June 30).

Contract payment

Each contract contains an automatic renewal clause so that the contract continues in effect automatically unless canceled by either party 180 or more days before expiration. This protects the students against a sudden cancellation. To be sure that the contract is funded by the diocese, contact the appropriate diocesan officials early in the budgeting process. Diocesan budgeting for EfM may require considerable advance planning. Often, funds must be approved by the annual council or convention of the diocese. Those who make decisions about those funds need complete information about the benefits of a contract. Such information should come from you as EfM coordinator.

Automatic renewals

A contract between the diocese and the Education for Ministry program cements the relationship, provides for a coordinator, **reduces fees for students**, provides for regular reports to the diocese, **pays for mentor training**, and sets in place a system for promoting the program, recruiting mentors and students, and dealing with problems that may arise.

Benefits of a contract

Kinds of Contracts

Diocesan Minimum Service Contract—This is best suited for dioceses having five to ten EfM groups. It provides for Sewanee to pay the trainers' honoraria for two training sessions per year and \$150 toward the coordinator's expenses. The cost of a Minimum Service Contract is \$1,500 annually.

Diocesan Full Service Contract—This provides a stipend and expense money for the coordinator as well as the honoraria for trainers to come into the diocese and lead mentor training. The amounts of the stipend and the expense monies depend upon the number of active EfM groups in the diocese. The cost of a Full Service Contract is \$2,500 annually, half of which (\$1,250) is due every six months.

Parish Contract—This contract is drawn up with individual parishes in dioceses where there are no more than five or six EfM groups. This is in lieu of a diocesan contract. Cost of the contract is based on the number of groups in the parish.

One group	\$350
Two groups	\$650

Three groups	\$900
Four groups	\$1,100
Five groups	\$1,250
Six groups	\$1,350

When there are more than four or five Parish Contracts in a diocese, it becomes advantageous to the diocese to consider putting them all under one diocesan contract.

All contracts provide students who are not already on a reduced fee with a reduction from the full fee. (See Diocesan Contracts, Appendix J, for complete information.)

Remuneration

In dioceses that have a Minimum Service Contract, the coordinator is provided a \$150 honorarium each year for EfM expenses. These funds may be used at the coordinator's discretion for work with EfM and are subject to reporting requirements. This is considered income and is reported to the IRS.

In dioceses that have a Full Service Contract, the coordinator is annually provided \$100 plus \$25 for each active EfM group. As above, these funds are considered income, and are reported to the IRS. (For more information about diocesan contracts, see the section on contracts. Sample contracts are included in Appendix J.)

The EfM program does not expect that these funds will cover all expenses. The coordinator acts on behalf of the diocese and Sewanee, and it is suggested that the diocese match, if possible, what is provided by Sewanee.

Coordinators in those dioceses that have a Full Service Contract receive a second honorarium of \$25 per group per year. This is also considered income and is reported to the IRS.

For each training session that a coordinator in a contracting diocese organizes, an honorarium of \$100 is paid to the coordinator once Sewanee has received the report of training from the coordinator. Normally, checks are sent about two weeks after the reports arrive in Sewanee.

A History for Education for Ministry

The Education for Ministry program was the brainchild of Dr. Charles L. Winters. He, along with other members of the faculty of The School of Theology of The University of the South, developed this unique program of theological education by extension. The first EfM groups were launched in 1975, and the program truly took off in 1976.

At the beginning Winters thought the program would be a success if as many as three hundred students enrolled. He and others were surprised by the program's phenomenal growth. The methods for theological reflection evolved, based on the suggestions of participants and mentors, and a training network was begun under the leadership of Flower Ross.

By 1980 the initial writing for the program was concluded and Professor Winters left Sewanee. The program had grown from its humble beginnings to a student body of about 5,000 in the United States and Canada. It had also spread overseas to the Bahamas, Australia, New Zealand, and on the American continent as far as Mexico and Nicaragua. Subsequently EfM also developed in Guyana, on the European continent, and in Hong Kong.

In 1982 a complete revision of the EfM materials was begun under the direction of the program director, Dr. David Killen. The Rev. Dr. Ross Mackenzie, a Presbyterian scholar and pastor, contracted to serve as general editor. That edition was completed in 1987, when an index was added under the direction of the Rev. Dr. J. Carleton Hayden. Parallel with the revision of the textbooks, the Rev. John de Beer, who had come to Sewanee in 1980 as director of training, supervised the production of parallel guides for each lesson as well as a series of common lessons for use by all students within a given year.

In 1998 a new revision was initiated under the direction of EfM program director the Rev. Dr. Edward de Bary who served as general editor. The revised Year One appeared in 1999 and subsequent years were printed one year at a time. All were completed in 2003. A complete revision of the parallel guides, the *Manual for Mentors*, and the common lessons is also in process. Materials that were frequently provided only to the mentors are now part of the text provided to all students. The format for the materials has changed from bound texts to loose-leaf.

As of ?? there were ?? graduates of EfM in the United States. Eighty-four dioceses of the Episcopal Church sponsor the program and EfM groups may be found in 48 of the 50 states. The program is used by the Disciples of Christ, Presbyterians, Roman Catholics, Baptists, and other denominations. EfM can be found outside the USA in Australia, New Zealand, Canada, Honduras, the Bahamas, Antigua and the northeast Caribbean, Hong Kong, the United Kingdom, Italy, Switzerland, and Germany.

EfM provides the Episcopal Church with a unique and dynamic program for training its future lay leaders. EfM is also used in special circumstances as part of the training for ordination; many who plan to undertake seminary studies

begin as students in the EfM program. In addition, EfM methods for working with seminars have been adapted for use in a number of church and secular programs. The Sewanee staff continues to refine the program's educational and training methods.

The University of the South, home to the EfM staff, is an Episcopal university wholly owned by 28 dioceses of the Episcopal Church. It has a College of Arts and Sciences and a School of Theology. Located on the picturesque Cumberland Plateau at Sewanee, Tennessee, The University of the South continues to train leadership for the nation and especially for the Episcopal Church through its various programs.

For an expanded history of the program see: Edward O. de Bary, "A History of the Education for Ministry Program: 1975-1992," *Sewanee Theological Review*, Pentecost 1994 issue, 37:3, 227-261.

Appendix A

Materials Provided to the Coordinator

Use this as a checklist.

A. Manuals and Materials

Manual for Coordinators

Manual for Mentors

Common Lessons and Supporting Materials

A set of EfM texts

B. Information

- Reports containing names and addresses of
All EfM coordinators
All EfM trainers and
Persons who reside in the diocese who are:
 - EfM mentors
 - EfM students
 - EfM graduates
 - Persons trained as mentors
- Advance notification of mentor training and mentor formation schedule
- Regular memoranda providing information about the EfM program
- The EfM newsletter and the coordinator newsletter
- Copies of correspondence from Sewanee when inquiries about EfM are made from the diocese

C. Promotional Materials (order as needed)

EfM brochures

EfM prospectuses

EfM display for conventions and special meetings

D. Special Materials

- Addressed mailing labels—can be furnished once a year if requested
- Training materials—sent in advance of each training session
- Start-up kits—sent routinely for mentor training but also on request by the coordinator; includes mentor and student registration forms

Appendix B

Sample Mentor Recruitment Form Mentor Training For The Education for Ministry Program

When:
Where:

Trainer:
Cost:

Mentor training for the Education for Ministry program provides you with new educational opportunities. Mentor training and accreditation are required for all who wish to lead an EfM seminar group. The training is useful for those who wish to learn methods of theological reflection that link everyday life to the Bible and to the tradition and history of our faith.

EfM mentors must possess a knowledge of scripture and the tradition of the church; however, they do not need to be ordained persons or seminary trained. Mentors must be willing to relate their faith to their lives and to explore theological issues in depth while working in a small community engaged in that quest. They are trained to help others in the seminar group develop their ability to think theologically. Accreditation of mentors at a basic training is not automatic; it is a discerning process worked out between individual participants and the trainer.

The enclosed brochure tells you more about EfM. It is a program of theological education by extension developed by The School of Theology of The University of the South, Sewanee, Tennessee. Rooted in the curriculum of the seminary, EfM provides lay persons with the basics of a theological education.

Mentor training is intensive and rewarding work, requiring 18 contact hours. If you cannot attend the entire workshop, please come another time. Late arrivals and early departures are disruptive to the training.

A non-refundable registration fee of _____, payable to _____, must be sent with your registration. This fee helps to pay for the cost of the workshop. We must have your registration form by _____ to order the materials needed for the session.

Name _____ Address _____
Phone _____ Parish _____
E-mail _____ Emergency Contact Information _____
Have you attended training before? _____ When? _____
Was the training you attended a basic/in-service or formation event? _____
Have you mentored a group? _____ When? _____
Do you have a copy of the *Common Lessons & Supporting Materials*? _____
Do you have a copy of the *Manual for Mentors*? _____

Return this form with your check to: _____

Mentor Training: Basic/In-service

I. PURPOSE

The purpose of mentor training is for participants to discern whether they have the desire and skills to be a mentor for the Education for Ministry program, and to provide ongoing training and support for experienced mentors with an EfM group. The event provides an opportunity for an EfM trainer to evaluate the skills of each trainee and to accredit those who qualify. Accreditation is not automatic.

II. PERSONS WHO MAY ATTEND

1. Anyone interested in becoming an EfM mentor.
2. An EfM mentor who has attended mentor training once and needs to update his or her accreditation.
3. An experienced EfM mentor who wishes to update his or her skills and information.
4. An EfM mentor whose accreditation is out of date.
5. A person who wishes to replace a mentor who is leaving a group and needs accreditation.
6. Someone who wants more information about the EfM program and training, but may not be ready or willing to mentor yet. You may attend “for information only.”

III. THE ROLE OF THE MENTOR

1. To facilitate and guide the seminar group in all aspects of the program.
2. To be the administrator of the group for the School of Theology Programs Center.

IV. SOME CRITERIA FOR PERSONS SEEKING TO BECOME AN EfM MENTOR

1. A desire to be a companion/guide to women and men as they engage in an intensive theological education program.
2. An ability to articulate one’s thoughts and feelings, show understanding of the thoughts and feelings of others, respond effectively to conflict and group dynamics, and be a facilitator rather than a teacher.
3. Maturity in a life of faith, comfort with the diversity of our rich Christian tradition, and familiarity with the study of biblical criticism.
4. A willingness and ability to manage administrative responsibilities in a timely fashion.

V. WHAT IS COVERED IN TRAINING

1. The nature and purpose of EfM.
2. The four-source model of theological reflection and methods used by the program to facilitate reflection and gather learnings.
3. The place and purpose of spiritual autobiographies in the program.
4. Group skills and resources for where to go if problems occur with the seminar group.
5. Worship as a part of an EfM group.
6. Current administrative procedures for the program.
7. Recruiting and beginning a seminar group.
8. Conducting an EfM seminar.

During a mentor training, the majority of the time will be involved with developing skills for theological reflection. Accreditation by the trainer is necessary before a mentor may enroll a group. Accreditation is not automatic.

VI. DURATION OF TRAINING

The training is on-site, intensive, and requires 18 contact hours. Mentor training usually involves six to eight participants and one trainer. Full participation is mandatory. Information on events scheduled in the United States may be obtained from EfM coordinators, on the EfM web site: <http://www.sewanee.edu/EfM/efmtraining/ntltrngsched.html> , or by contacting the School of Theology Programs Center:

The School of Theology Programs Center
The University of the South
335 Tennessee Avenue
Sewanee, TN 37383-0001
800/722-1974
931/598-1165 = fax
efm@sewanee.edu = e-mail address

Appendix D

Mentor Formation Events

Mentor formation is designed for the experienced, active EfM mentor who would like to work more intensively on one particular aspect of his or her formation as an EfM mentor. Any active mentor who has been trained no less than two times at mentor training and who has been recommended at the second mentor training to attend a mentor formation for the next cycle of accreditation, may attend. Note: A mentor may choose to attend another mentor training rather than a mentor formation even if that mentor is eligible for mentor formation.

The following formation events are offered. A description of each follows.

- Common Lessons
- Design Skills
- Equipping for Ministry
- Experiential Learning
- Four-Source Theological Reflection
- Group Skills and Human Interaction
- Living with Conflict
- Mentoring an On-Line Group
- Myers-Briggs
- Power and Authority
- Spirituality of Mentoring
- Transition in the Midst of a Changing World
- Vocation
- Worship

COMMON LESSONS: To examine in depth the Common Lessons used in EfM, with particular attention to Lessons 3, 4, and 5. The event is designed to familiarize mentors with these lessons, demonstrate the centrality of the Common Lessons to the program, and increase the comfort of mentors in leading these lessons. *(1 trainer, 6-12 participants)*

DESIGN SKILLS: To learn to design seminar sessions which meet a specific need in the mentor's particular seminar group, including guidelines for planning, administering, and evaluating designs. *(1 trainer, 6-12 participants, or 2 trainers, 13-18 participants)*

EQUIPPING FOR MINISTRY: To understand lay ministry as part of the total mission and ministry of the church. Participants will develop skills for equipping seminar members to exercise their ministries as the baptized people of God. *(1 trainer, 6-12 participants)*

EXPERIENTIAL LEARNING: To increase the mentor's ability to help seminar groups learn from their own experience and thereby take responsibility for their life together. Trainees will learn basic

theories of experiential education which will be tested and developed during training. *(1 trainer, 6-12 participants)*

GROUP SKILLS AND HUMAN INTERACTION: To refine mentors' group skills through building community and understanding group dynamics as related to EfM groups. Mentors will become aware of group leadership skills and styles of human interaction and gain confidence in using theories and learnings in the EfM setting. *(2 trainers, 8-12 participants)*

LIVING WITH CONFLICT: To enhance the mentor's ability to be a point of God's loving presence in the midst of conflict. This will be done by increasing the ways we can respond to strong differences between people and by creating a community of support in which we can examine conflict situations in our lives. *(2 trainers, 8-12 participants)*

MENTORING AN ONLINE GROUP: To learn to use Blackboard distance learning tools for mentoring EfM Online. The mentor can expect to gain skills in planning live chat sessions, using the whiteboard, preparing slides for Theological Reflection, and mentoring in a virtual reality. *(2 trainers, 6-8 participants)*

MYERS–BRIGGS: To explore and recognize, through use of the Myers–Briggs (MBTI) categories and inventory, the varied talents and perspectives of different personality types and their relationship to group life and spiritual growth. *Please note that this formation event does not certify the mentor to be able to administer the MBTI instrument. (1 trainer, 6-12 participants)*

POWER AND AUTHORITY: To equip mentors to identify and explore the dynamics of power and authority in the life of the EfM group. Trainees will identify and explore their own sense and sources of power and authority as mentors and will be encouraged to identify and explore "The Source" of all power and authority for themselves and the EfM group. Seminar members will assist one another in identifying and exploring issues of power and authority in their ministries in the world. *(1 trainer, 6-12 participants)*

SPIRITUALITY: To experience and explore our own spirituality and draw implications for mentoring by having a time of refreshment and renewal. This is achieved through deepening our relationship with God and exploring resources for our spirituality. *(1 trainer, 6-12 participants)*

TRANSITION IN THE MIDST OF A CHANGING WORLD: To utilize the core EfM resources to equip mentors to identify, explore, plan and implement actions as we move through transitions to new life in the midst of change. This training will provide opportunities for mentors to build awareness of change and transition in their lives and to use theological reflection, stories and worship in order to live creatively in the midst of our changing and diverse world. *(1 trainer, 6-12 participants)*

VOCATION: To reflect on your own sense of vocation and call, then consider how you can strengthen the sense of vocation and call of the participants in your EfM groups. You can expect to gain a deeper understanding of the preparation needed for a person to claim his or her calling and

experience some of the power which is released when you do what you love in service of what is most important to you. *(1 trainer, 6-12 participants)*

WORSHIP: To explore the interweaving of personal devotion and corporate liturgy in worship in order to equip mentors to develop their seminar groups as worshipping communities. As a result of this formation event you may expect to: distinguish/articulate the relationship between personal devotion and corporate liturgy; acquire the “know-how” to design worship with seminar groups; use more fully the resources available through EfM materials (i.e. TR, CLSM and Texts) for study and worship. *(1 trainer, 6-12 participants)*

Appendix E

Checklist for Arranging Training Events

- _____ Check with diocesan calendars to coordinate events.
- _____ Check with prospective participants to coordinate dates.
- _____ Set date, location, and starting and ending times.
- _____ Decide on type(s) of training [basic/in-service or formation**]. If formation, choose the formation topic from those listed in Appendix D. Note that some of the formations require two trainers and a larger number of participants.
- _____ Call or write Sewanee to put the event(s) on the master calendar. Be prepared to provide the EfM program coordinator with dates, location, event type, formation topic, and starting and ending times.
- _____ Make local arrangements:
 - _____ Plan housing, with private accommodations for trainer(s).
 - _____ Arrange for food (on-site meals work best). Provide snacks and beverages for the initial gathering, break and social times.
 - _____ Plan your budget. Remember that you must cover the trainer's expenses (Sewanee reimburses the trainer for his or her expenses, and then invoices the coordinator for that amount). Sewanee pays the trainer's honorarium.
 - _____ Set costs for participants. Be sure to charge enough to meet your expenses — meals and housing for trainers and trainees, trainer's travel and incidental expenses
- _____ Prepare and send publicity and registration forms and registration instructions.
- _____ Contact individuals whom you know are interested—active mentors in your diocese. You may also wish to invite inactive mentors and EfM graduates. Call Sewanee and request mailing labels.
- _____ Respond to registrations using a confirmation letter like the sample in Appendix F. Be sure to provide parking instructions and a list of what to bring in the letter (CLSM, mentor's manual, worship preparation resources, comfortable clothing, etc.).

EMPHASIZE IN THE CONFIRMATION LETTER THAT:

- Training requires 18 contact hours.
- The event is planned to begin and end on time and that full attendance is mandatory; late arrivals and early departures are not acceptable.

- Accreditation of mentors at a basic/in-service training is not automatic; the trainer will evaluate each trainee's readiness to lead a seminar group.

_____ Accept the proper number of registrants for each event. [For basic/in-service, six is the minimum and eight is the maximum. For formation, the numbers allowed vary depending on the topic [i.e., Four-Source Theological Reflection = 6–10 participants with one trainer; Living With Conflict = 10–14 participants with two trainers]. **You cannot exceed the maximum number of participants for an event unless you obtain permission from the trainer. You cannot proceed with an event with less than the required minimum number of trainees without permission from Sewanee.**

_____ If numbers warrant adding an additional training event, call Sewanee right away to schedule the event and request another trainer.

_____ If you need to cancel an event due to a lack of registrants, call the EfM program coordinator immediately. Sewanee must report a cancellation to the contracted trainer exactly 14 days prior to the start date of the scheduled event. If we fail to meet that deadline, the Programs Center has to pay the trainer one-half the honorarium (\$375) anyway.

_____ Communicate with trainer(s):

_____ Ask the trainer(s) about transportation, housing, scheduling, any special dietary needs, and what extra supplies might be needed. Exchange cell phone numbers with trainers so you can communicate on travel day.

_____ Send the trainer information about the trainees (i.e., their names, where they are from, number of times they have attended training, and the types of training they have attended: basic/in-service, or formation).

_____ Arrange to have the trainer(s) met, if necessary.

NOTE: Provide a private room for the trainer so that he or she can focus exclusively on training. Trainers are not responsible for administrative conference details, for collecting registration fees, or for arranging housing or meals. These responsibilities belong to the coordinator or the coordinator's delegate.

_____ Three weeks before the training, tell Sewanee the number and training status of participants you expect so that training materials can be sent to you. Provide the EfM program coordinator with your preferred shipping address. For basic/in-service events, Sewanee will need to know how many new/first-time trainees you have (those who do not have the *Common Lessons and Supporting Materials* [CLSM] notebook and the new *Manual or Mentors*) and how many active mentors you have. Active mentors should have the CLSM and new mentor's manual. Also, please note that those who have trained before, but who have never started groups may not have a current CLSM or manual. You will need to check with these folks.

_____ Obtain an easel, newsprint, markers, tape, Bibles, prayer books, CD player, and any other supplies requested by the trainer. Some trainers incorporate art into training exercises. They may ask for clay, finger paint, string, crayons, etc.

- _____ Bring your Years 1-4 textbooks to training so that newcomers can look at text content.
- _____ Prepare a list of participants, including the trainer, to place in each participant's and trainer's packet.
- _____ Greet and register participants.
- _____ Enjoy the training event while making sure that hospitality and professional assistance is provided!
- _____ Pay bills.
- _____ Fill out and send to Sewanee the coordinator's report of training and the honorarium requisition form (Appendices G and H). NOTE: Honorarium requisitions must be signed by the diocesan coordinator, not his or her delegate.
- _____ Pay expenses billed to you by The School of Theology Programs Center (trainer's expenses for travel, food, and incidentals).

COORDINATOR: If you must be absent during a training event, choose a delegate to perform these duties. Make sure to "train" your delegate. Provide him or her with whatever information, materials, and supplies needed to administer the training event effectively. Ask the delegate to read the "Mentor Training" section of this manual and provide this checklist. Explain the tasks and your expectations.

#####

To be eligible to attend a formation training, one must have attended two training events and been accredited by the trainer at the second training as ready for formation training. Formation trainees must be active mentors who have led groups within the last 12-18 months. **NOTE: After three consecutive non-basic/in-service events (formation or alternate training) mentors must return to a basic/in-service training.

Appendix F

Sample Letter to Acknowledge Registration for Training

(Addressee)

Dear _____,

I am delighted that you will be able to attend mentor training (date and place). Thank you for returning your registration. We look forward to your participation.

We will gather at _____ (place) _____ at (date and time). The event will end at (date and time). Remember that you must be present for the entire training, and late arrivals or early departures are not acceptable. Come rested. The training is intensive work, requiring 18 contact hours. There will be some breaks to give you an opportunity to relax and enjoy the conference center, but we will work mornings, afternoons, and evenings.

The conference center will provide us with meals, bed linens, blankets, and towels. Please bring your own Bible, *The Book of Common Prayer*, your *Common Lessons and Supporting Materials* notebook, and *Manual for Mentors*. You may be asked to help plan worship, so bring along any resources that will help you do that. Dress is casual. You may wish to bring a bathing suit since there is a swimming pool for our use.

I am looking forward to our time together to share and learn from each other and from our trainer, _____ . I have enclosed information about what you should expect in the training session and a roster of all expected participants. I have also included a map to help you find _____ Conference Center and parking instructions.

Please let me know if you have special dietary, housing, or other needs, and send me your emergency contact information, E-mail address, and cell phone number.

Please call me if you have any questions. My number is _____ .

Sincerely,

Enclosures

Appendix G

COORDINATOR'S REPORT OF TRAINING EVENT

Coordinator _____ Diocese _____ Event # _____

Date of the Event _____ Trainer _____

Location _____ Briefly describe facilities. Were they adequate?

Number who registered _____ Number who participated _____ Fee \$ _____

Please give your impressions of the event, the participants, and the trainer:

Please comment on the support and information you received from us in Sewanee:

Prospective dates, location, start and end times, and event type for your next training event:

Signature of Coordinator

Date

On the back, please write comments you feel would be of help to the EfM training system.
Please return this form to: The School of Theology Programs Center, The University of the South,
335 Tennessee Avenue, Sewanee, TN 37383-0001

OFFICE USE ONLY: Date received _____ Payment processed _____

Program Director _____ Asst. Director _____

Program Coordinator _____

Appendix H

COORDINATOR'S HONORARIUM FORM

Event # _____ Dates of Event _____

Location of Event _____

Honorarium\$100.00

Signature _____

Coordinator's Name _____ SS # _____

Address _____

Appendix I

EDUCATION FOR MINISTRY MINIMUM SERVICE CONTRACT FOR JUDICATORY SPONSORSHIP

A memorandum of agreement between the diocese/judicatory of

and The School of Theology of The University of the South, Sewanee, Tennessee, for sponsorship of the Education for Ministry (EfM) program.

I. The Program

- A. Seminar Groups: Education for Ministry is a four-year program. The seminar group, composed of 6-12 people, is the center of the EfM program.
- B. Students: Students enroll in the EfM program for a nine-month academic cycle. Each student is responsible for paying a fee at the beginning of each nine-month cycle.
- C. Materials: Packets of program materials are sent by The School of Theology for each academic cycle upon receipt of the fee.
- D. Mentors: Each seminar group is led by a mentor who acts as an independent contractor. Mentors are required to attend a mentor training session before beginning a group. Each mentor must be reaccredited every 12 to 18 months to continue serving as mentor. See Appendix D to this diocesan contracts for discussion of selection and training of mentors.

II. EfM Diocesan/Judicatory Coordinator: An EfM diocesan/judicatory coordinator is jointly appointed by the diocese/judicatory and The School of Theology. The duties and responsibilities of the coordinator are specified in Appendix A to this contract.

III. Sponsorship Benefits

- A. Fee Reduction: The basic fee is reduced for each student. See Appendix C to this contract for definition of fee reduction not related to diocesan/judicatory sponsorship.
- B. Trainer Honoraria: Contract fee covers the honoraria for two mentor training sessions.
- C. Coordinator Expenses: The School of Theology will provide \$150 to the coordinator for expenses incurred on behalf of the EfM program. The \$150 will be paid within thirty (30) days of receipt of the contract fee and expense form.

IV. Cost of Sponsorship

- A. Annual Fee: \$1,500, payable as stated below.
- B. Training Expenses: The diocese/judicatory accepts responsibility for travel, lodging, food, and incidental training expenses of the EfM mentor trainers who conduct training sessions within the diocese/judicatory. See Appendix B to this contract.

C. EfM Promotion: The diocese/judicatory accepts responsibility for promoting the EfM program; promotional materials will be provided by The School of Theology and may be supplemented by the diocese/judicatory.

V. Contract Period

This agreement shall be for a period beginning _____ and ending _____. Thereafter, unless either party shall have given the other notice in writing not less than 180 days prior to the end of any period that it does not desire to continue under this agreement, it shall be automatically renewed for successive periods of one (1) year each. During the period of any renewal all the terms and conditions of the agreement shall continue in force and effect unless amended in writing signed by both parties.

VI. Payment of Contract Fee: Payment due on anniversary date.

AGREEMENT

CONTRACT PERIOD _____ through _____
Anniversary date

COST: \$1,500 PAYMENT DUE at anniversary date

FOR THE SCHOOL OF THEOLOGY:

Education for Ministry Program Director

Date

FOR THE DIOCESE/JUDICATORY:

Signature

Date

Title

Appendix I (2)

EDUCATION FOR MINISTRY FULL SERVICE CONTRACT FOR JUDICATORY SPONSORSHIP

A memorandum of agreement between the diocese/judicatory of

and The School of Theology of The University of the South, Sewanee, Tennessee, for sponsorship of the Education for Ministry (EfM) program.

I. The Program

- A. Seminar Groups: Education for Ministry is a four-year program. The seminar group, composed of 6-12 people, is the center of the EfM program.
- B. Students: Students enroll in the EfM program for a nine-month academic cycle. Each student is responsible for paying a fee at the beginning of each nine-month cycle.
- C. Materials: Packets of program materials are sent by The School of Theology for each academic cycle upon receipt of the fee.
- D. Mentors: Each seminar group is led by a mentor who acts as an independent contractor. Mentors are required to attend a mentor training session before beginning a group. Each mentor must be reaccredited every 12 to 18 months to continue serving as mentor. See Appendix D to diocesan contracts for discussion of selection and training of mentors.

II. EfM Diocesan/Judicatory Coordinator: An EfM diocesan/judicatory coordinator is jointly appointed by the diocese/judicatory and The School of Theology. The duties and responsibilities of the coordinator are specified in Appendix A to this contract.

III. Sponsorship Benefits

- A. Fee Reduction: The basic fee is reduced for each student. See Appendix C to this contract for definition of fee reduction not related to diocesan/judicatory sponsorship.
- B. Trainer Honoraria: The School of Theology will pay the honoraria for one EfM training session, plus one training session for every seven (7) active EfM groups on January 1.
- C. Coordinator Expenses:
 - 1. The School of Theology will pay to the EfM coordinator \$100 within 30 days of receipt of the first contract payment and coordinator expense form.
 - 2. The School of Theology will pay to the EfM coordinator \$25 for each active EfM group six months after the anniversary date of the contract.
- D. Coordinator Honoraria:
 - 1. The School of Theology pays an honorarium of \$25 per active EfM group.
 - 2. Number of active EfM groups is determined six (6) months after the contract anniversary date.

Appendix I (3)

EDUCATION FOR MINISTRY CONTRACT FOR CONGREGATIONAL SPONSORSHIP

A memorandum of agreement between

and The School of Theology of The University of the South, Sewanee, Tennessee, for sponsorship of the Education for Ministry (EfM) program.

I. The Program

- A. Seminar Groups: Education for Ministry is a four-year program. The seminar group, composed of 6-12 people, is the center of the EfM program.
- B. Students: Students enroll in the EfM program for a nine-month academic cycle. Each student is responsible for paying a fee at the beginning of each nine-month cycle.
- C. Materials: Packets of program materials are sent by The School of Theology for each academic cycle upon receipt of the fee.
- D. Mentors: Each seminar group is led by a mentor who acts as an independent contractor. Mentors are required to attend a mentor training session before beginning a group. Each mentor must be reaccruited every 12 to 18 months to continue serving as mentor. See Appendix D to diocesan contracts for discussion of selection and training of mentors.

II. Sponsorship Benefits

- A. Fee Reduction: The basic fee is reduced for each student. See Appendix C to this contract for definition of fee reduction not related to congregational sponsorship.
- B. Congregational Coordinator: A coordinator is appointed to centralize the administration of the EfM contract in the congregation.

III. Cost of Sponsorship

One Group	\$350	Four Groups	\$1,100
Two Groups	\$650	Five Groups	\$1,250
Three Groups	\$900	Six Groups	\$1,350

IV. Contract Period

- A. One year, renewable. (Contract may be canceled by either party effective upon the anniversary date of the contract. Thirty (30) days' notice must be given in writing by the canceling party.)
- B. Anniversary date: The first day of any month; renewable one year later.

V. Payment of Contract Fee: Payment due on anniversary date.

VI. Addition of Groups to Original Contract

- A. Groups can be added only during the first six months of each contract year.
- B. A supplemental agreement will be signed as new groups are added to the original contract.
- C. One original contract plus the supplemental agreements will cover all groups in a congregation regardless of the nine-month cycle on which each group operates.

AGREEMENT

CONTRACT PERIOD: _____ through _____
Anniversary date

NUMBER OF GROUPS: _____ COST: _____

FOR THE SCHOOL OF THEOLOGY:

Education for Ministry Program Director Date

FOR THE SPONSORING AGENCY:

Signature Date

Title

Appendix I (4)

EDUCATION FOR MINISTRY
SUPPLEMENTAL AGREEMENT FOR SPONSORSHIP OF EfM
CONGREGATIONAL CONTRACT

A supplemental agreement to add _____ group(s) to the existing contract between

and The School of Theology at The University of the South, Sewanee, Tennessee, for sponsorship of the Education for Ministry (EfM) program.

SUPPLEMENTAL AGREEMENT

ORIGINAL CONTRACT DATED _____ to _____

NUMBER OF GROUPS ADDED _____

TOTAL ADDITIONAL COST \$ _____

PAYMENT DUE DATE _____

FOR THE SCHOOL OF THEOLOGY:

Education for Ministry Program Director

Date

FOR THE SPONSORING AGENCY:

Signature

Date

Title

APPENDIX A TO DIOCESAN CONTRACTS

THE EDUCATION FOR MINISTRY COORDINATOR

A. Purpose of the EfM Coordinator

1. To coordinate the EfM program within the judicatory
2. To act as liaison between the sponsoring agency and The School of Theology EfM program director

B. Qualifications

1. Experience in organization and management
2. Experience in the EfM program or behavioral education system
3. Knowledge of judicatory organizational structure
4. Thorough knowledge of the “program” section of the *Manual for Mentors*

C. Appointment Period: Concurrent with contract

D. Responsibilities

1. To the judicatory for the ongoing oversight of the EfM program
2. To The School of Theology for maintaining the quality of the program, for advice in selection of mentors, and for scheduling of training events

E. Duties

1. To publicize the EfM program in appropriate media in the area
2. To promote introductory sessions for the purpose of attracting new students
3. To be a resource of information about the program and to answer inquiries
4. To screen prospective mentors
5. To organize training events within the judicatory in cooperation with The School of Theology
6. To facilitate any changes that occur in terms of groups (e.g., change of mentor, insufficient number of students to sustain a group, etc.)
7. To resolve problems and to notify The School of Theology, if necessary
8. To act as a communications center for mentors, students, the judicatory office, and The School of Theology staff
9. To submit to The School of Theology EfM program director new ideas and suggestions for the program

F. Remuneration

1. An honorarium is paid to the EfM coordinator ONLY (even if someone else fills in for the coordinator of record). Note: If a coordinator serves for a portion of the contact year, the honorarium will be prorated over the number of months served and the number of groups active at the time the coordinator terminates his/her service.

2. The honorarium is not full compensation for the work done. It is a symbol which recognizes the commitment of the coordinator and the mutual accountability that exists in the EfM program.
3. The coordinator is an independent contractor and not an employee of The University of the South.
4. The coordinator receives additional honoraria monies to help defray costs incurred on behalf of the EfM program under the guidelines of the Full Service Contract and the Minimum Service Contract.

APPENDIX B TO DIOCESAN CONTRACTS

TRAINING SESSIONS

A. Responsibilities of Sponsoring Agency

1. To provide a suitable location for training sessions
2. To provide information about sessions to mentors and prospective mentors
3. To pay for the travel, lodging, food, and incidental training expenses of the mentor trainers (This cost may be charged to the participants as part of the cost of attending the session, or the judicatory may absorb the cost.)
4. To organize training sessions and ask The School of Theology EfM program director to contract with the trainer

B. Responsibilities of The School of Theology

1. To provide the most currently revised *Manual for Mentors* and other training materials for each event
2. To contract with a trainer for the event

C. Mentor Training and Mentor Formation Sessions

1. Length of event: 18 contact hours for mentor training
18 contact hours for mentor formation
2. Group size: mentor training sessions are for groups of 6 to 8 persons per trainer. Training sessions for less than 6 persons may be negotiated on a case-by-case basis. Mentor formation groups vary in size. For details consult the *Manual for Coordinators* or the *Manual for Mentors*.
3. Trainer honorarium: This fee is limited to the amount set forth in the contract between the trainer and The School of Theology.

APPENDIX C TO DIOCESAN CONTRACTS

FEE REDUCTION

A. “Contract” Fee Reduction

1. Basic fee: Effective on July 1 each year; the basic fee is the amount charged for one nine-month cycle.
2. A reduction of the basic fee is allowed for each student sponsored by a diocese/judicatory or congregation.

B. “Group Size” Fee Reduction

This provision is applicable only in cases of need. The question of who is to receive the fee reduction must be decided by the group.

1. If a group enrolls 8 or 9 full-paying students, one student can enroll at the fee reduction rate set on July 1 each year.
2. If a group enrolls 10 to 12 full-paying students, two students can enroll at the fee reduction rate set on July 1 each year.
3. “Group Size” fee reduction applies regardless of sponsoring status.
4. A mentor with more than one qualifying group can combine all students to apply the above rules.
5. “Group Size” fee reduction is intended for use only in cases of genuine hardship.

APPENDIX D TO DIOCESAN CONTRACTS

SELECTION AND TRAINING OF MENTORS

A. Qualifications

1. EfM seeks individuals:
 - a. who have experience in serious religious study and familiarity with methods of biblical scholarship;
 - b. who are mature in faith, evidenced by an ability to live with the ambiguity that lies in biblical tradition and allows for a range of individual interpretation;
 - c. who can enable their groups to develop a life in which the members seek and find answers in a mutually supportive environment.
2. Individuals must have the ability to work with people rather than be informers of people.
3. Individuals must be able to articulate their own thoughts and feelings while understanding the thoughts and feelings of others.
4. Individuals must be able to manage conflict effectively.

B. Training

1. An individual must attend a mentor training session to be accredited as a mentor.
2. Each mentor must be reaccredited every 12 to 18 months.
3. After attending mentor training twice, an active mentor may attend a mentor formation session (advanced work in special areas) if the trainer at the second training recommends the mentor for formation training.
4. Active mentors who have attended three or more training sessions may apply to the EfM Program Specialist at the Programs Center for permission to attend an alternate training event.

C. Selection

Any interested person may register for a mentor training session. Accreditation is the responsibility of the EfM trainer. The diocese/judicatory and The School of Theology have joint responsibility in disallowing an individual to serve as a mentor for just cause. Only active mentors who have been trained at least twice and been so accredited may register for mentor formation.

D. Relationship

Mentors are independent contractors (rather than employees) who agree to lead an Education for Ministry group in the manner described in the *Manual for Mentors*. They are paid honoraria as long as they maintain their accreditation and serve as mentors for one or more active groups.

Appendix J

Promotional Aids

Various promotional aids are available from the Education for Ministry program and can be provided without charge. These include: brochures, prospectuses, posters, and an EfM promotional videotape or DVD.

The graphic on this page may be duplicated, enlarged, or used on your materials when promoting the EfM program. It is also available in digital format. You can download the logo from the EfM Web site by right-clicking (if using a PC) on the logo and saving it to your document. Our Web site is: <http://www.sewanee.edu/EFM/EFMhome.html>.



Appendix K
Definitions of EfM Terms

alternate training	A class or workshop that may substitute for mentor training or formation after completion of three consecutive training events, all within 4 1/2 years prior to the application for alternate training, and that may be used in alternate 18-month cycles by mentors who have a group enrolled
coordinator	A person appointed jointly by the diocese and the EfM program to act as the liaison between the diocese and the program, promote the program in the diocese, arrange for mentor training, and act as a communications link when questions need to be answered
diocese or judicatory	A geographic area governed by a bishop or president with which the EfM program may contract
mentor formation	Advanced mentor training for active mentors who have attended at least two mentor trainings and been accredited as eligible for formation
mentor training	The required instructional event in which mentors can obtain accreditation; mentors must renew their accreditation every 18 months
trainer	A person with whom the EfM program contracts to lead a training event for mentors