

## EfM Canada Policy

*These policies were approved by the Board of EfM Canada on September 8, 2018. Please note that the policies and procedures of EfM Canada may be different from the policies and practices of the EfM parent organization at the Beecken Center at the School of Theology, University of the South. EfM Canada policies are those approved from time to time by the Board of EfM Canada.*

### **Introduction**

This document sets out the policies of EFM Canada and describes the roles of the various participants, mentors, students, trainers and coordinators, and their relationship to each other. The objective of EFM Canada is to provide a program and resources to form adult Christians for their baptismal ministry. EFM Canada operates under a licence from the Beecken Center at the School of Theology, University of the South, Sewanee, Tennessee.

EfM is a program of theological education for lay people. It operates in a diocese or other judicatory at the invitation of the bishop or judicatory official when the bishop or judicatory official has chosen EfM to be part of the diocesan program for adult Christian education.

### **Appropriate Behaviour**

EfM has zero tolerance for any form of abuse. In the event of any complaints the policies and processes of the diocese or other judicatory related to any form of abuse, sexual abuse or harassment will apply. EfM mentors and Coordinators are expected to comply with all diocesan expectations about training in applicable diocesan programs and training sessions. EfM Mentors, Students, Coordinators, and Trainers are encouraged to become familiar with applicable policies. Abuse should be reported to the diocesan bishop, the diocesan coordinator, and the Director of EfM Canada.

EfM participants may not use the seminar group as a place to sell or promote a product or service. EfM participants may not use the seminar group as a place to recruit for other groups or programs within or outside of the church. EfM participants may not use their seminar group as a place for fundraising for any cause within or outside of the church. Any person who contravenes this section should be reported to the Diocesan EfM Coordinator and to the Director of EfM and may be excluded from participation in the seminar.

### **Privacy policy**

The personal information of individual students and mentors is collected only for the internal purposes of EfM Canada and the EfM program in the sponsoring diocese. EfM Canada complies with the *Personal Information Protection Act* and *Freedom of Information and Protection of Privacy Act of British Columbia* and those of other jurisdictions as may be relevant from time to time. Information about members of EfM is not sold, rented, or given to other groups. Information is stored in a secure manner within the offices of EfM Canada and the Diocese of Kootenay.

### **The Mentor**

In EfM the mentor is a guide and facilitator, not a teacher. The texts provide the teaching; the mentor facilitates the processes of integration using the resources of the *Reading and Reflection Guide* and Theological Reflection in the seminar.

### Who may be a mentor?

A mentor is an active participant in the life of an Anglican or Lutheran congregation, who has been accepted by the bishop or his or her appointee, and who is mature and has demonstrated abilities for the work of mentoring an EfM group. A person from another denomination may be accredited with the consent of the Director of EfM, in consultation with his or her denominational officials. The usual expectation for a mentor is that he or she has some theological education or two years of EfM. This can be waived at the request of the bishop or by permission of the Director of EfM Canada.

### Mentor Training

Training is provided for mentors. Once trained mentor is able to answer these questions in the affirmative:

- I can lead a group through theological reflection.
- I can foster an atmosphere where people feel free to express themselves.
- I can articulate my thoughts and feelings and honor the thoughts and feelings of others.
- I can guide a group in the midst of ambiguity, unanswered questions, serious doubts, and strong convictions.
- I can judge appropriate times to challenge ideas or behaviors of individuals and/or the group.
- I can allow people to disagree.
- I am familiar with the historical-critical approach to biblical interpretation.
- I have experienced serious religious study.
- I can refrain from being the "expert."
- I am willing to have my ideas challenged.
- I can support people through a crisis without having to "fix it" for them.

### Why EfM requires Mentor Training

One of the strongest norms for EfM from the very beginning has been that students benefit most from EfM when there is a trained and skilled mentor with the group. It is essential that our mentors keep their skills up-to-date, to hear and practice new techniques for mentoring and to be accountable to the program so that students have the best possible learning experience.

We think that every mentor has something more to learn or skills that need to be sharpened. We encourage mentors to seek feedback and to set learning goals and to use training events to achieve those goals. Mentors are the core of the EfM process and we are committed to fine training for their benefit and for the good of the students.

### Types of Training

There are three distinct types of training for an EfM mentor.

**Foundations of Seminar Life** is for new mentors, mentors with some experience leading a group, and for trained mentors who have never led a group.

**Formation Training for Mentoring and Ministry** is for those active mentors who have attended at least two Foundations events and have been recommended by a trainer. Formation events focus on a particular area of mentor skills. Talk to your coordinator if you qualify for Formation. After a Formation event mentors must return to a Foundations event.

**Alternate events.** This is for experienced mentors who qualify for Formation training. With the permission of the Director of EfM or the Director of Training you may attend a non-EfM event of at least 18 contact hours that you believe will enhance your skills as a mentor. You must get permission before attending the event and then send a report of the event outlining some of the things you learned. When the report is received your re-accreditation will be granted, so be sure to send your report.

Mentors for EfM Online train at a special event that offers orientation to the Blackboard system that supports Online group interaction as well as other general matters related to a mentor's growth and development working in the Online environment. EfM Online mentor training is considered to be a Formation level event.

All mentors must be accredited by an EfM Trainer in a Basic Training. All mentors must be re-accredited yearly in an In-service training. The 12 months requirement may stretch to a maximum of 18 months to allow for contingencies. All trainings include 18 contact hours, including worship but excluding meals.

Mentors for **EfM Online** qualify when:

- They have two or more years of experience leading a face-to-face group
- They have been accredited as an EfM online mentor through an online training event
- They have good technological skills and a good computer and a high-speed connection

A mentor may attend an EfM mentor training anywhere in the world where one is offered. However the mentor must facilitate the communication process so that the Director of EfM Canada and the Director of Training of EfM Canada are properly informed and that there is an appropriate record of the recommendation of accreditation by an EfM Trainer. The mentor's Diocesan Coordinator should also be advised.

A mentor is accountable to the bishop of the diocese for his or her work in mentoring an EfM group according to the EfM program as set forth in the Reading and Reflection Guide.

A person who is not currently accredited as a mentor by an EfM Trainer, or who does not have the approval of the diocesan bishop will not be permitted to register a group.

There is no recognition by EfM Canada of other positions including, but not limited to, mentor-in-training, or apprentice mentor. There are only accredited mentors who have a currently registered group, and accredited but inactive mentors.

When two mentors work together in a group they are considered to be co-equal and the mentor fee is divided between them. One mentor is designated to be the administrative mentor for the group for communication purposes.

An EfM seminar group has a minimum of six registered students and no more than 12 registered students. A mentor may not receive the mentor fee if the group is registered with fewer than 6 students or if withdrawals reduce the number of registered students to 5 or fewer. Registrations will not be accepted for groups of four students or fewer, simply because the program cannot be effectively carried out with numbers that small.

Mentor fees are paid for the 9 months of the academic year; they are not paid in June, July and August. Mentors are contractors by the definitions set forth by CRA therefore, no T4 slip is issued, however

mentor fees are taxable income and mentors are responsible for reporting them for income tax purposes.

Mentors receive the Reading and Reflection Guide at no charge and receive reimbursement for texts according to the rates set from time to time. EfM is only able to register, pay for and issue books for a maximum of **two** mentors in a group.

#### The Mentor Agreement

When a mentor registers each one is required to sign an agreement which reads:

As a mentor of an EfM Group I understand that I am accountable to the diocesan Bishop and to his or her appointees. I will follow the program as set forth in the *Reading and Reflection Guide*, I will comply with diocesan policies as they apply to me as a leader in the church. I agree that I will administer the EfM program according to the standards set by EfM Canada, as agreed by the diocesan bishop, including the submission of registrations, tuition, materials orders, and Group Status reports. I understand that I must be accredited as a mentor before registering a group and that I must attend training annually to maintain my accreditation. I understand that by the definition set forth by the Canada Revenue Agency I am a contractor and that fees received for my work as a mentor must be reported for income tax purposes.

Our purpose in expecting mentors to use the program as it is designed to be used is to protect the learning experience of the student, and to comply with the terms of our license from the University of the South. When mentors fail to use the integrative components, especially theological reflection, or when they take other steps to change the learning format and environment there is a detrimental effect on the student. For this reason mentors are required to sign the agreement and consequences may be imposed on those who do not comply with the agreement.

In consequence for breaching the agreement EfM Canada may:

- Withhold the mentor fee
- Withdraw the mentor's accreditation
- Refuse to allow the mentor to register a group

Any apparent breach of these policies on the part of the mentor may be discussed with the mentor. It may also be discussed with the Diocesan Coordinator and the Diocesan Bishop. If further training will help, a trainer may be consulted. If no resolution is found and the breach persists the Director will act, in consultation with the bishop, according to policy to impose consequences.

#### **The Student**

Education for Ministry is a program of adult education, it assumes that the learner is motivated and understands that the return in learning and growth is proportional to the effort made by the learner. Learners should expect to spend at least 2 to 3 hours in reading and preparation for the seminar.

Anyone who wishes to learn may register in EfM however, it should be noted that EfM is not a place for problem-solving, or therapy, nor is it a support group, rather it is a community of adult learners engaged in serious theological education and reflection. Persons who are experiencing a crisis may find EfM quite demanding and may wish to wait for a more opportune time. Those who are deeply committed to the literal understanding of Scripture may find EfM disturbing as EfM provides a scholarly examination of the Scriptures that assumes a variety of human authors, and theological perspectives.

EfM is a not-for-credit program. There are no exams or essays; there is no form of evaluation of student progress.

The University of the South will grant 18 CEU's (Continuing Education Units) per year if the student has a 90% attendance rate. The application for the CEU credits must be made through EfM Canada.

At the time of registration the student must pay the enrollment fee as set by the Board from time to time.

Every **new** student must begin EfM in year one.

Students who wish to enrol in EfM Online are advised to have good computer skills, a newer computer and a high-speed connection. All of the policies related to EfM students apply in the same way to students of EfM online.

**Graduates** who wish to repeat all or part of EfM may enroll in any year and must pay the enrollment fee.

A student who is **not** a graduate and who wishes to repeat a year may do so by registering and paying the enrollment fee for that year.

The *Reading and Reflection Guide* is copyrighted, it may not be sold to anyone by EfM Canada or by anyone else. The Guide is available only to mentors who have registered a group and to students who have registered and paid the enrollment.

#### Refund Policy

Any refund will be reduced by the amount of any bursary that has been granted in that year.

If the group folds without meeting a full refund will be issued and any Reading and Reflection Guide must be returned.

If a registered student withdraws before September 30 (or January 31 in the case of a January start) they may receive a refund less an administration fee.

If a registered student withdraws before October 31 (or February 28 in the case of a January start) they may receive a refund of 50% of the course fee after the standard administration fee is deducted.

No other refunds are available.

A student who withdraws before the first meeting of the seminar may receive a refund of the enrolment fee, less an administrative charge.

A student whose learning is interrupted by significant life transitions such as serious illness or employment changes may, under certain conditions, return to the same year upon re-registering and paying an administrative fee as set by the Board from time to time. This will include a *Reading and Reflection Guide* in use in the current year. The conditions include, but are not limited to:

- The Group Status Report for the year in which the interruption took place must reflect the non-attendance
- the group mentor must make the application for re-admission
- the group must have a minimum of six other registered and paid students, and
- the consent of the Director of EfM Canada must be obtained and will be given on a case by case basis.

### The Bursary

The old tuition reduction program is no longer available; it has been superseded by the bursary program.

EfM Canada has established a Bursary Fund to assist students in financial need. The Bursary Fund is funded by donations and by the dues of the EfM Alumni/ae Association.

The number of bursaries in any year depends upon available funds.

The maximum bursary per student is \$100 per year.

To be eligible applicants must be enrolled in EfM Canada, or be applicants of the EfM Canada program.

Selection criteria:

- Applicants must demonstrate a need for financial assistance.
- Applicants must have a serious commitment to the full EfM program.
- Applicants must have a serious commitment to Christian Lay Ministry.
- Applicants must be recommended by an EfM mentor.
- Applicants must be recommended by a Christian community or church.

Application Procedures:

- Applications will be submitted to the EfM Canada office on the application form as specified.
- All application information will remain confidential.

Selection Process:

- Applications must be submitted by the first of September or the first of January.
- All applicants will be notified by the Director or Administrator of EfM Canada regarding the decision.

Students in financial need are also encouraged to explore grants for lay training which may be available in the diocese or grants which may be available from a parish or parish group.

### **The Trainer**

An EfM Trainer conducts training sessions of 18 contact hours (including worship, but not including meal times) for groups of at least 6 and up to 8 mentors or candidates for training. Events of fewer than 6

persons or more than 8 will take place only by agreement with the trainer and the Director of Training in consultation with diocesan coordinator.

Training events are organized by the local coordinator.

Trainers may recommend accreditation as a mentor, or may recommend that the candidate not be accredited. Trainers are expected to discuss a decision not to accredit with prospective mentors in private before any general announcement is made to the group. Sometimes, after consultation with the candidate, a trainer may indicate that a person in training has chosen to attend FIO, For Information Only.

The trainer is assigned to the event by the Director of Training or the Director of EfM who will try to ensure that mentors experience a variety of trainers, as logistics permit.

The Trainer is paid the training fee by EfM Canada upon receipt of the report in the current format and including a complete record of all participants with their contact information. Trainers are contractors of EfM Canada so no T4 will be issued. Trainers should understand that trainer fees need to be reported on their income tax.

A trainer's expenses are paid by the diocese, or by arrangement, may be partially paid by EfM Canada in extraordinary circumstances. Expenses include transportation to the training location, meals in transit and during the training, and accommodation.

A trainer in Canada would normally attend the week-long Canadian Training of Trainers in alternate years both to hone skills and to meet with other Canadian trainers, the Director of EfM, the Administrator and, when possible, the Bishop of Kootenay.

Trainers are persons with rich experience of EfM, notable interpersonal skills, evident ability to lead, and with strong abilities to offer feedback which encourages growth in others. They are persons with both the discernment to identify mentor potential and the courage to say "no" or "not yet" to a candidate who is not ready, as well as "yes" to those who are able to move forward in a mentoring role. Trainers must be available and willing to travel across Canada to serve the needs of EfM. They are nominated by other trainers who identify these and other strengths.

There are few vacancies for the position of trainer. When a vacancy occurs the potential candidates are reviewed by the Director of EfM, the Director of Training and other senior leaders, in the EfM network. There are many factors that are considered, in filling a vacancy, some of which are the internal needs of the EfM program. Candidates are interviewed by the Director of EfM and/or the Director of Training prior to being offered the appointment.

### **The Diocesan Coordinator**

The diocesan Bishop appoints the Coordinator for EfM and is encouraged to consult the Director of EfM Canada about the appointment of the Coordinator. The Coordinator needs the support of both the diocese and EfM Canada to serve effectively. The Coordinator serves at the pleasure of the Bishop.

A person is likely to be a good diocesan coordinator if:

- He or she is knowledgeable about EfM, able to explain the program to others
- She or he is enthusiastic about EfM and pleased to share that enthusiasm

- She or he knows the diocese well including the diocesan structures and organizations and diocesan staff
- He or she is an organized and able administrator

The Coordinator's basic responsibilities include:

- Promotion of the program in the diocese is a primary responsibility. There are many means to accomplish this task and there are resources available from EfM Canada. The Coordinator may have a booth or table at synod if this is permitted, host EfM information events, identify and encourage likely mentors and many other things. Print resources and promotional items as well as encouragement and advice are available from the office of EfM Canada.
- Identifying and recruiting potential mentors.
- Arranging the training events is a crucial task. There is a check list available to guide the Coordinator. Support and encouragement are available from the EfM Canada office and the Director of Training for EfM Canada.
- The Coordinator is the monitor for the relationship between the Diocese and EfM Canada. This means making the diocesan officials aware of the activities of the groups in the diocese, it may mean arranging a diocesan or regional graduation service and asking the Bishop to preside. It means arranging for the sponsorship contract to be renewed each year and payment to be forwarded to EfM Canada.
- If a problem arises, in an EfM group or in the Diocese, the Coordinator should work to seek a solution and may draw on the resources of the Director of EfM Canada, the EfM Canada office, and may seek support within the diocese as well.

The Coordinator in a sponsoring diocese receives an annual fee issued at the time the sponsorship contract is renewed. Coordinators are contractors so no T4 is issued however Coordinators are reminded that this income is reportable for income tax purposes. The coordinator is encouraged to ask the diocese to allocate a budget to cover additional expenses.

### **The Diocese**

A diocese or other judicatory may sign a sponsorship agreement. This agreement provides for :

- a tuition reduction of \$100 per student .
- two training events per year for mentors held in locations deemed suitable by the diocese.
- an expense allowance for a Diocesan Coordinator.

The sponsoring diocese must arrange to pay for travel and accommodation for the trainer. Some dioceses have a budget to cover this expense, in other dioceses the costs are shared out among the trainees. EfM Canada makes every effort to keep the costs as low as possible and, in extraordinary circumstances, will assist with costs.

### **The EfM Canada Office**

EfM Canada is a ministry of the Diocese of Kootenay which holds a licence from the School of Theology of the University of the South for the promotion and distribution of the EfM program within Canada.

EfM Canada operates under the direction of the Director of EfM Canada who is appointed by the Bishop of Kootenay. The Director of EfM Canada is accountable to the bishop and to the Diocesan Council.

The Board of EfM Canada serves the program by creating vision, planning for the longer term, approving a budget and by setting policy. The Board has Terms of Reference approved by the Diocesan Council of the Diocese of Kootenay.

The Administrator in the EfM Canada Office is hired by the Director of EfM in consultation with the Bishop of Kootenay and is accountable to the Director of EfM Canada.

### **EfM Online**

EfM online is under the jurisdiction of the Diocese of Kootenay and the expenses related to maintaining our connection with the University of the South EfM online and the Blackboard program are paid by EfM Canada. This means that EfM online students have the same financial costs payable to EfM Canada as students in other groups.

### **Exceptions**

The Director of EfM Canada will be responsible to guide the implementation of these policies. Any exceptions to these policies will be at the discretion of the Director of EfM Canada who may consult the Bishop of Kootenay and/or the Board of EfM Canada.